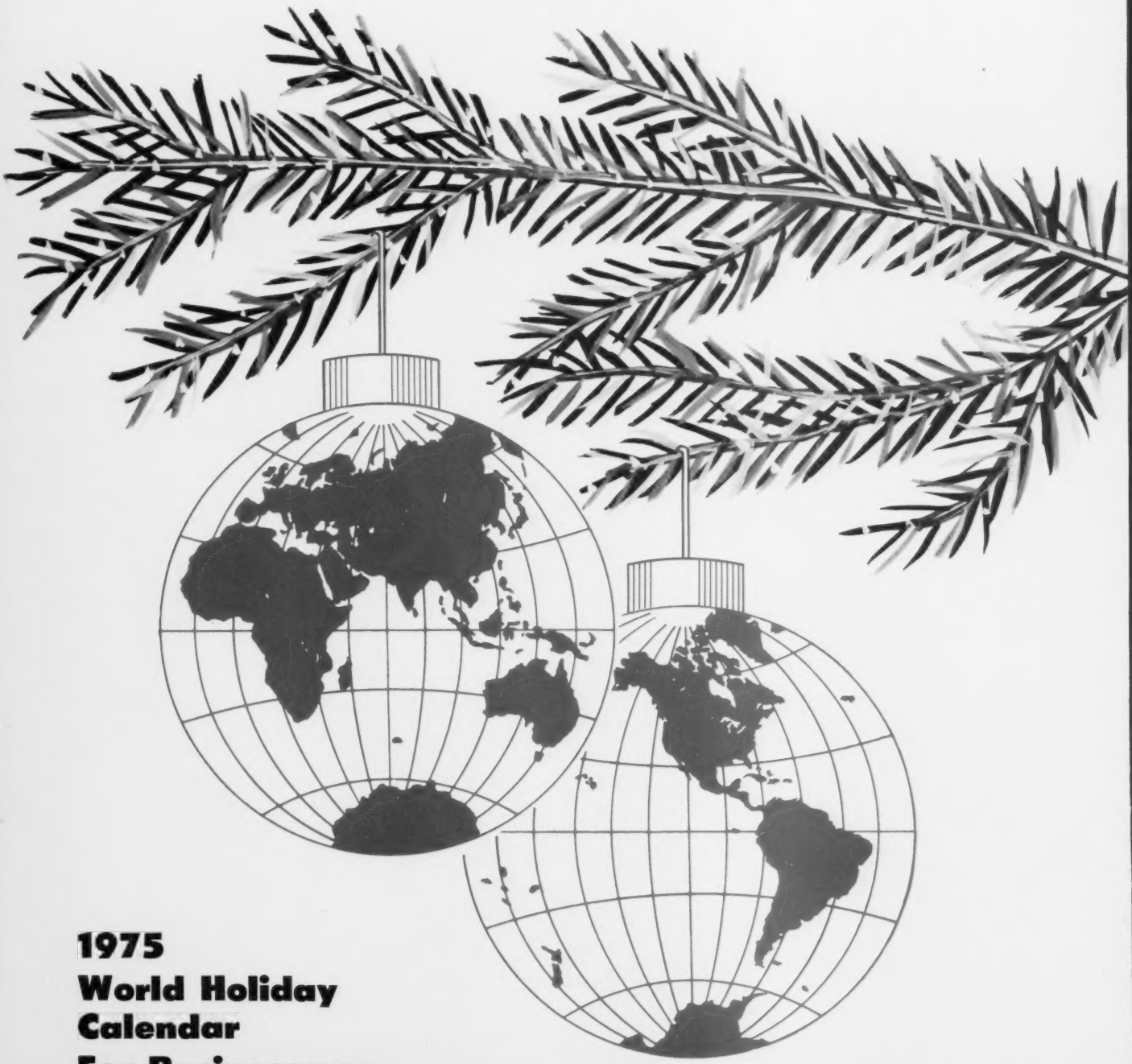
DECEMBER 23, 1974

Commerce Today



1975 World Holiday Calendar For Businessmen

Season's Greetings

Commerce Today

Vol. V, No. 6, December 23, 1974

2 Economic Highlights

Dollar outlays for plant and equipment expected to continue to increase in the first half of 1975 but prices, financing, other factors introduce elements of uncertainty.

4 Newsmemo

5 Project Independence Presents Energy Options, Plus Their Costs

What is believed to be the most comprehensive energy analysis ever performed outlines how the various proposed energy solutions could impact on the U.S. economy.

8 Millionth Trademark Is Registered; 400,000 Valid In U.S.

Special ceremonies last week marked the registration of the millionth trademark by the Commissioner of Patents 104 years after the first registration.

10 Energy Management Digest

11 Domestic Business Report

Attack on fire fatalities waged by actions involving burning plastics, sleepwear—Black-owned businesses record major gains in numbers, sales—Minorities get $6 million slice of shipyard pie—New minority firms need fair access to goods in short supply—Stockowning is still the province of the wealthy, despite some shifts—Capital spending plans not likely to provide an economic stimulus—Canadian tourists can take more U.S. goods home—Report cites security training as important to cutting crime.

23 International Commerce Report

Exhibition results from Germany, Scandinavia, Singapore, Mexico—Washington Official Trade Briefs—Economic reports from Brazil, Ecuador—World Holiday Calendar for Businessmen—Licensing, investment, trade opportunities around the world.

U.S. DEPARTMENT OF COMMERCE

FREDERICK B. DENT
Secretary

JOHN K. TABOR
Under Secretary

BASIL R. LITTIN
Special Assistant to the Secretary for Public Affairs

THOMAS A. BELL
Director of Communications

RICHARD BALENTINE
Editor

CLARENCE M. ZENS
Associate Editor, International Commerce

ARTHUR McDERMOTT
Associate Editor, Domestic Business

AMERICO A. W. FAVALE
Graphics

Staff Writers: ***Douglas F. Carroll, Felix Cotten, Margaret L. Hanson, Leslie Wilder.***

Published biweekly by the U.S. Department of Commerce, Washington, D.C. Annual subscription rate $29.80 ($7.45 additional for foreign mailing, $5.75 additional for domestic air mailing). Single copy $1.15. Make checks or money orders payable to Superintendent of Documents and mail to Superintendent, U.S. Government Printing Office, Washington, D.C. 20402, or to any U.S. Department of Commerce District Office.

All subscription inquiries and address changes should be sent to the Superintendent of Documents, at the above address. This is the central distribution agency for U.S. Government publications.
Microfiche copy available at $1.45 per issue from National Technical Information Service, Springfield, Virginia, 22151. Other inquiries should be sent to the U.S. Department of Commerce, 14th Street and Constitution Avenue, Washington, D.C. 20230.

Contents of this publication are not copyrighted unless indicated, and if not so indicated, the articles may be reproduced in part or in full without any prior consent. The Secretary of Commerce has determined that the publication of this periodical is necessary in the transaction of the public business required by law of this department. Use of funds for printing this periodical has been approved by the Director of the Office of Management and Budget through August 31, 1976.

COVER: *Our Christmas issue contains the 1975 World Holiday Calendar For Businessmen beginning on page 31. This is an annual feature of particular interest to U.S. businessmen traveling abroad during the new year. With that we extend season's greetings to our growing readership.*

Investment In New Plant And Equipment Uncertain Because Of Prices, Financing

Economic Highlights is prepared by James L. Pate, Assistant Secretary of Commerce for Economic Affairs.

Business spending intentions, as measured by the latest Commerce Department survey, suggest a general slowing in the rate of increase in plant and equipment expenditures for the first half of 1975. The momentum of plant and equipment spending has eased over the past 18 months, with respective increases of 6.9, 4.4, and 4.0 percent for the first and second halves of 1974 and the first half of 1975. The recent impact of large price increases has caused a significant divergence between expenditures and real capital formation, and also introduced an important element of variability in the plant and equipment spending expectations.

Since planned expenditures are usually a budget target set well in advance, actual spending for plant and equipment typically does not deviate substantially from initial estimates. There are factors, of course, which are capable of causing acceleration or delay and at times elimination of spending plans. These include substantial changes in sales and earnings, delays in construction progress or equipment deliveries, and changes in capital goods prices.

In the second and third quarters of 1974, there were noticeable revisions in actual spending figures compared to the initial estimates. Sharp rises in capital goods prices seemed largely responsible for these changes in spending. Firms, after contracting for specific items, found themselves paying substantially higher costs by the time the items were installed. A frequent complaint from purchasers concerned their inability to contract for a fixed price at the time of order.

Another contributing factor to the shifting of quarterly spending patterns was the energy embargo. In the turmoil which marked its impact last winter, many industries tended to delay spending to the extent they felt their business would be affected by the energy problem. One example was airline industry expenditures for 1974, which have steadily decreased in the surveys reported over the last year.

A study of business investment in the third quarter, on a national income accounts basis, strengthens the view that current business spending is not at present a source of strength in the economy. The only elements of business fixed investment that increased in real terms were business purchases of autos, trucks, and buses. Moreover, the exact amount of investment in truck purchases is uncertain because lighter weight trucks can be consumer, rather than business, expenditures. Third quarter investment in other areas, such as structures and producers' durable equipment, declined in real terms.

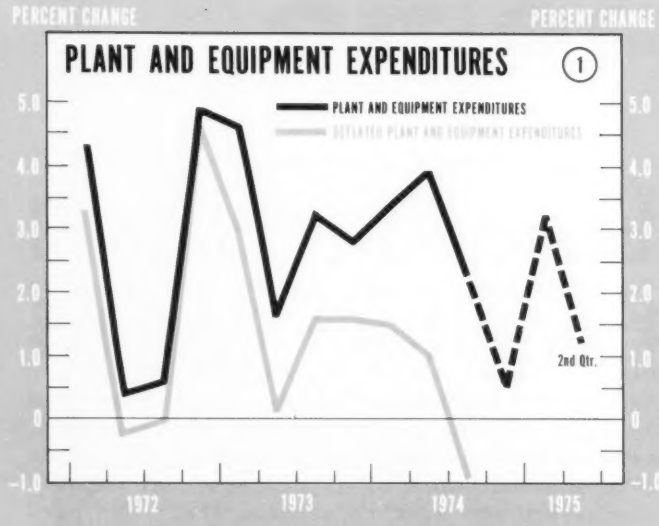
The investment experience of different industries, of course, was affected in different degrees from that suggested by the aggregate data. On a current dollar basis, capital expenditures in the basic processing industries were stronger than in the advanced processing industries. The basic processing industries have suffered capacity problems in 1973 and 1974 and are still operating at a high rate of capacity utilization.

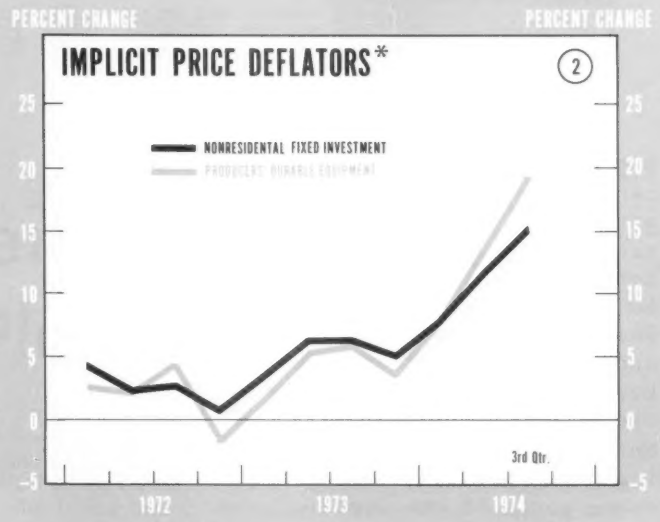
Plans for the first half of 1975, shown in some detail in the Commerce survey, generally indicate increases for manufacturing industries. Some examples of basic processing industries which are planning increases include the petroleum refining, chemical, steel, and paper industries. Nondurable goods manufacturers expect the largest increases. Machinery and motor vehicles manufacturers are anticipating lower outlays than in 1974. After two years of declines, the airlines are expecting to increase spending in the first half of 1975. Gas utilities also anticipate a substantial increase. However, there are offsetting decreases among the commercial sectors such as retailers and wholesalers. Nonmanufacturers, as a group, estimate only a 0.5 percent increase in the first quarter and a −0.8 percent decline in the second quarter.

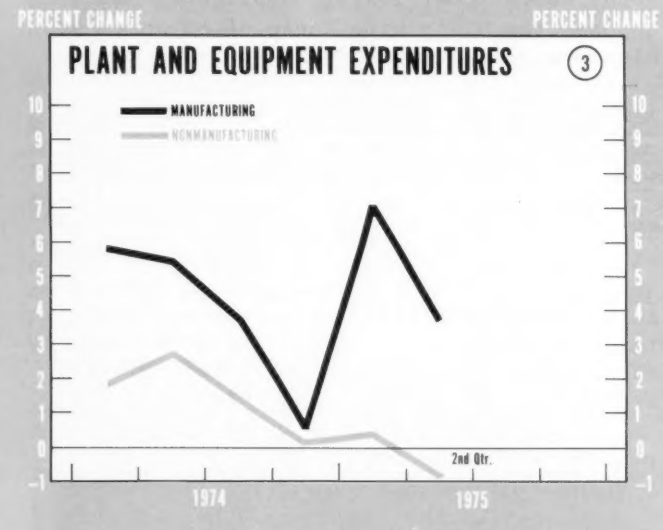
Financing difficulties may delay some plans. Utilities are having particularly great difficulties. Some ease may be occurring, but definite signs have not yet emerged. Corporate bonds yields recently declined to April levels, but the rate remains high compared with 1973 figures. Corporate profits and cash flow have improved steadily in 1974, but much of the favorable appearance of these factors is due to the ambiguity of book and inventory profits—another problem attributable to the current inflationary environment.

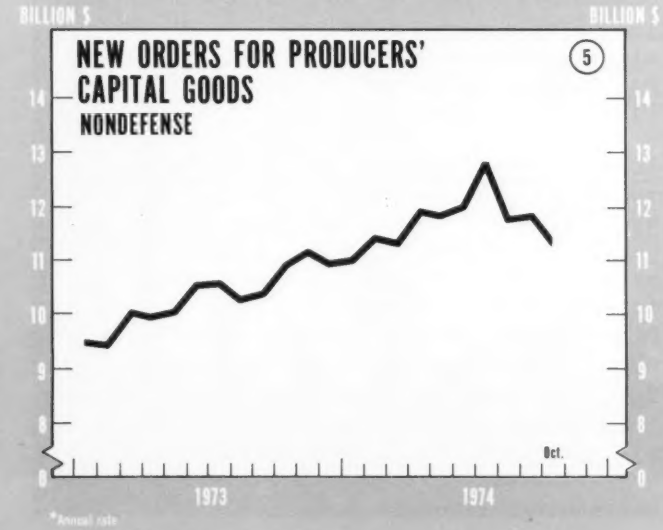
Since inflation has influenced business spending anticipations enough to make the actual level more uncertain than in the past, examination of other indicators of future investment can be helpful in determining the prospects for real investment. One of these indicators, the backlog of durable goods orders in October, seems to have peaked and declined, which is the first time since 1971. New orders for producers' capital goods have also slowed after recording a high in July. As the chart on the price deflator for capital goods shows, the apparent strength over the latter half of 1973 and 1974 was due largely to price increases.

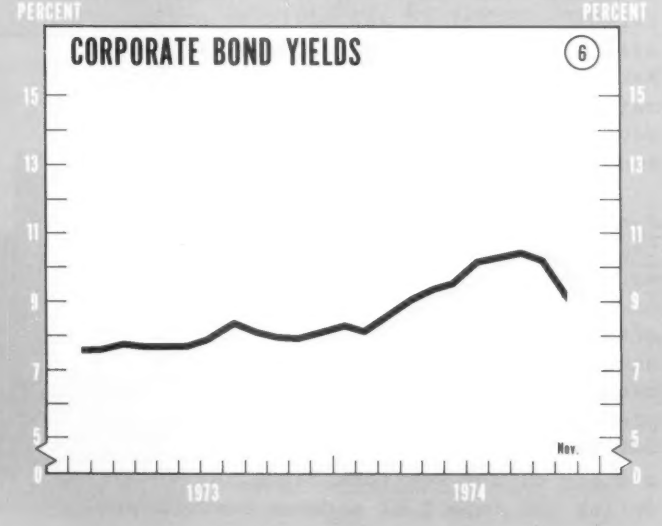
In sum, quarterly expenditures for the remainder of 1974 have some possibility of being boosted upward, but largely through increased prices for capital goods. Some of the exogenous variables that influenced expenditure patterns in early 1974, such as the energy crisis, should not alter spending plans in the latter half of this year. Plans for 1975 reveal that the spending levels in real terms might register a decline, depending on businessmen's judgments of inflation. Several indicators of future investment also suggest that growth in real investment may be slowing for the next several quarters.











*Annual rate

All data seasonally adjusted except corporate bond yields

Plant and equipment expenditures deflated on the basis of the implicit deflator for nonresidential fixed investment

Newsmemo

Better service to U.S. businessmen by American Embassies and Consulates through improved management techniques. This was the aim of recent joint Commerce-State Department sessions in Rome and Paris that brought together 80 U.S. Foreign Service officers stationed in Western Europe. The planned upshot will be increased marketplace research and widened business contacts, and better training and use of local professionals on office staffs. More of these joint meetings--Export Marketing Management Conferences--will follow in other parts of the world.

Seven minority-owned banks have been chartered recently, bringing the U.S. total of such institutions to 68. All told, these banks hold deposits of about $1.2 billion. Five of the new banks are in Texas: Brownsville National, Pan American National of Dallas, Continental National of El Paso, Plaza National of Harlingen and Union National of Austin. The others are American Indian National of Washington, D.C., and First Prudential of West Palm Beach, Fla.

Extension Service, so well-known to farmers and home economists, is looking toward the shore and the sea. A landmark agreement between the U.S. Department of Agriculture and Commerce's National Oceanic and Atmospheric Administration will set up close working relationships among State Cooperative Extension Services and advisory programs that assist the U.S. marine community. NOAA's National Sea Grant program, for example, maintains advisory services that further the development, conservation and wise use of America's marine resources.

Another NOAA marine program is moving ahead--the investigation of man's effect on his watery environment. Marine Ecosystems Analysis, or MESA, focuses on coastal and offshore regions to determine what can be done to correct past mistakes that have harmed the environment, and to learn how to predict the environmental consequences of future actions. The first major project is a study of the New York Bight, which will define the impact of a dense human population on surrounding waters. Another MESA study will assess probable environmental impact of oil leasing in the Gulf of Alaska.

"Visiting Professional" is the term now given to a business executive attending courses at New York University. The VP can go to day or night advanced classes without having to pursue a degree or certificate. The new program is aimed at working businessmen who already have an MBA--or its equivalent in other graduate academic work or in professional experience--and who want to achieve their own personal educational goals. Applicants can choose from NYU's wide range of advanced and highly specialized business courses.

American manufacturers have opened a technological gap that is as much as two years wide. This is one of the conclusions of a 14-country study that the Commerce Department is publishing to help build U.S. exports of electronic components. In addition to this important lead time advantage over competitors, the study tells U.S. producers that total consumption of such items as resistors, capacitors, color TV picture tubes, diodes, rectifiers, transistors and integrated circuits is expected to rise by about 50 percent in the 14 countries by 1977. The 159-page "Global Market Survey--Electronic Components" is the latest in a series by Commerce's Office of International Marketing. Single copy price is $2.30, at Supt. of Documents, U.S. Govt. Printing Office, Washington, D.C. 20402, or at any Commerce District Office.

It's an interdependent world, economically speaking. One example is the link between West Germany's production lines and prosperity in southern Europe. A recent report by the Bundesbank shows that 2.5 million foreign workers sent $3.5 billion out of Germany last year. Turkey's 576,000 migrant workers sent home more than $1 billion. Yugoslav, Italian, Greek and Spanish workers transferred $905 million, $555 million, $370 million and $349 million, respectively. The workers also put over $1.8 billion into German savings accounts.

Commerce Today
Vol. V, No. 6
December 23, 1974

Project Independence Presents Energy Options, Plus Their Costs

There is no single solution to the energy problem. There are many proposals which, either individually or in concert with other ideas, could probably solve the U.S. energy shortage. Project Independence simply outlines how painful each of the various solutions could be expected to be, and who would be hurt most.

Prepared by the Federal Energy Administration, the report was presented to Interior Secretary Rogers C. B. Morton in early November. Based on the reports of more than a dozen inter-agency task forces, it is believed to be the most comprehensive energy analysis ever performed.

While the report itself does not recommend specific policy actions, it attempts to place the nation's energy alternatives and their impacts in perspective, and focus public debate on the issues and choices this country faces.

In the past, attention has been focused on particular measures, instead of a total national energy policy. This report is designed to correct this situation by providing a framework within which to evaluate the individual issues.

The U.S. annual rate of growth in energy has been 4-5 percent during the last 20-25 years. In 1970, the United States was using about 70 quadrillon BTU (quads) of energy each year as compared to about 20 quads in 1940. Coal use, which peaked about 1920, is below the levels that it was 25 to 30 years ago. Domestic petroleum output has increased rapidly, but so have imports, and we now are importing more than 6 million barrels a day. Nuclear power, which was expected to be a major source of energy, is only now surpassing firewood as an energy source.

Tops whole world

The Middle East nations have the greatest portion of world crude petroleum reserves. In fact, the Middle East has more crude petroleum reserves than the rest of the world combined. While some nations import almost all of their oil, such as Japan and many of the European countries, the United States imports roughly 30 percent of the petroleum it uses. The Middle East, on the other hand, exports over 20 million barrels a day while it consumes only half-a-million barrels a day (see chart). Needless to say, the Arab oil embargo last winter had a major effect on the nation's perception of the energy problem.

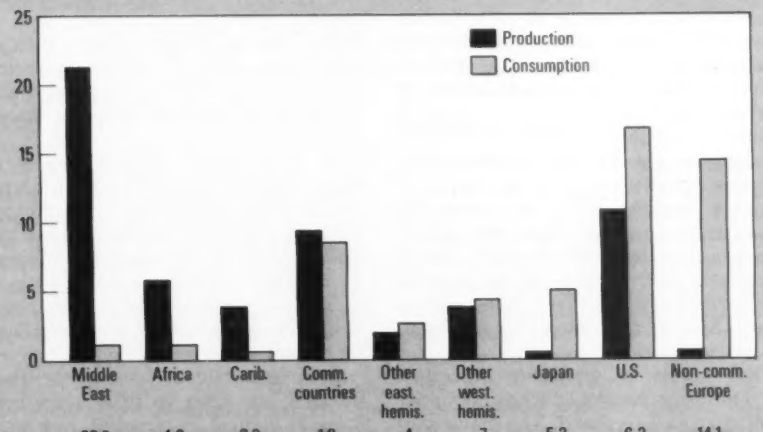
The embargo caused a one-time decline in Gross National Product of about $4-8 billion. While all of this reduction cannot be traced to energy, the energy crisis certainly had an impact on U.S. economic activity.

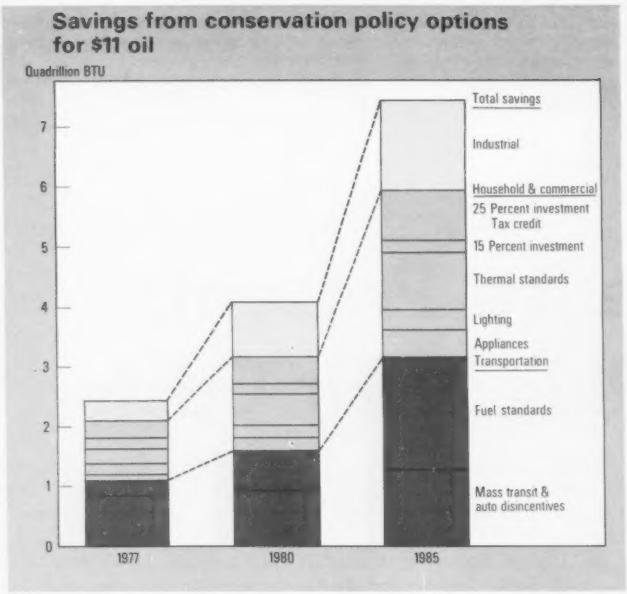
While the United States is now importing about six million barrels a day, FEA estimates that imports could be reduced to 3.3 million barrels a day in 1985. This decline in imports would result in a reduced demand for energy and increased production from sources that are economic at higher prices, even if no major federal policy actions are taken. If the cost returns to pre-embargo levels, however, imports could amount to more than 12 million barrels a day.

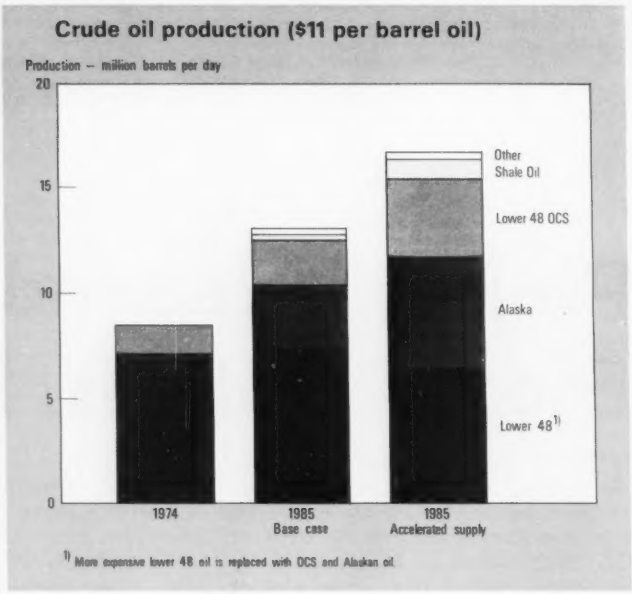
The import situation in the rest of the world would not vary quite as much with respect to price. For example, Japan's imports would be relatively constant as prices vary between $4 to $11 a barrel. The estimated world demand for imports would be about 30 million barrels a day at $11 oil, 45 million barrels a day at $7 oil, and over 65 million barrels a day at $4 oil. This compares to an estimate of production capacity of about 50 million barrels a day from the oil producing nations of the world, which indicates that under a pure market assumption the world oil price is likely to be closer to $7 a barrel than to $4 or $11, the FEA report concludes.

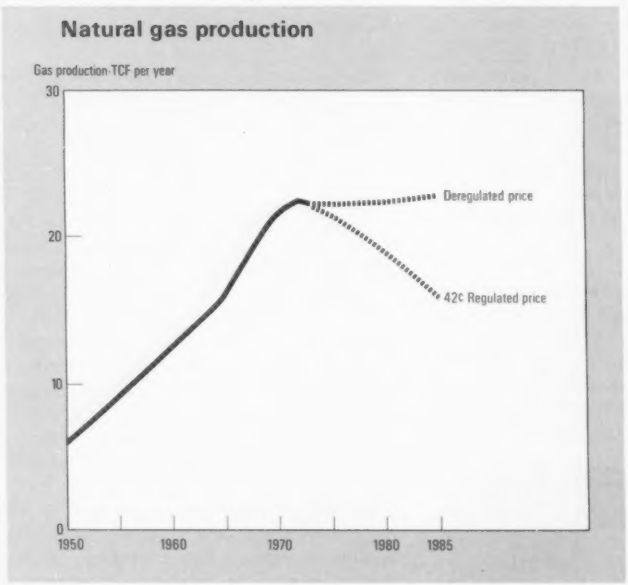
The FEA forecasts a growth in energy demand from about 72 quadrillon BTU in 1972 to about 103 quads in 1985 at $11 oil, and 109 quads at $7 oil. These estimates correspond to growth rates of about 2.7 percent and 3.2 percent, respectively, and are lower than earlier fore-

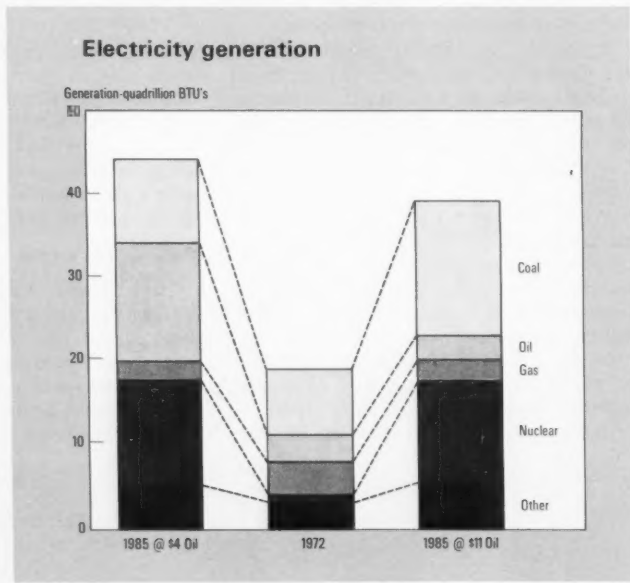
1973 Crude petroleum production and petroleum product consumption for major producing and consuming areas (MB/D)






Crude oil production ($11 per barrel oil)
Production – million barrels per day
Other Shale Oil
Lower 48 OCS
Alaska
Lower 48 1)
1974
1985 Base case
1985 Accelerated supply
1) More expensive lower 48 oil is replaced with OCS and Alaskan oil





casts by the Department of Interior of about a 3.7 percent growth rate, and by the National Petroleum Council which projected as much as 145 quads of consumption by 1985.

FEA's forecast shows not only that an important shift in imports would occur as the price of oil varies, but that an important shift between fuels that are used would also occur. As the price of oil increases, more coal would be used, since it would be cheaper than imported oil. In addition, as the price of oil increases, the domestic supply of oil would also increase, demand would be reduced, and imports would decline. At either price of oil, nuclear power is expected to grow substantially between now and 1985; but not at the previously projected rate.

The production of crude oil will shift by 1985, from fields in the lower 48 states to offshore and Alaska. Domestic crude oil production peaked in 1970 and has declined ever since; and probably will continue to decline at least through 1976 or 1977, before increasing as a result of development in newer fields. If the price of oil is at $7 a barrel, onshore lower 48 production could decline to less than five million barrels a day by 1985. Even at $11 a barrel, this production would be less than its current levels, with any gains coming mainly from tertiary recovery, tar sands, and heavier crude oil.

The sources of electricity generation will also vary considerably as the price of oil changes (see chart). The major shift is between coal and residual oil, with oil being more predominant at $4 a barrel and coal having much greater use at $11 a barrel. Nuclear power is expected to grow from about 3 to 30 percent of electricity generation by 1985; and natural gas will decline as it is shifted to more important uses.

At $11-a-barrel oil, the import total would drop to about 3.3 million barrels a day by 1985, but would widen no matter what the price of oil in the next few years. The situation is dramatically different at $7 a barrel oil, because consumption increases and production decreases and the United States would be importing almost 50 percent of its petroleum needs.

It is important to look at the market for coal, according to FEA, since coal is basically limited by demand and not the supply that can be produced at any particular price.

To achieve its maximum use would

require reduced uncertainty about the environmental constraints on coal.

One of the most important policy actions that could be undertaken relates to the price of natural gas (see chart), the report states. If natural gas remains regulated at 42 cents per thousand cubic feet, FEA estimates that production would decline from the current 22 trillion cubic feet per year to about 15 trillion cubic feet by 1985. This decline of about 40 percent would represent a significant reduction in natural gas production. If the price is deregulated, FEA estimates that natural gas production would hold constant or increase slightly.

The FEA projections are posited on what is called the Base Case, or the case in which no major new federal actions are taken to increase supply or reduce demand. Among such actions that could be taken are development of oil and gas in the Atlantic, Pacific and Alaskan Outer Continental Shelf and in the Naval Petroleum Reserves; deregulation of natural gas prices; increased shale oil production; and accelerating nuclear power plant construction.

Conservation areas

To conserve energy, the main areas of public action would be: the automobile, where standards could be set to improve automotive efficiency or incentives could be provided to reduce the number of miles traveled; industry, which uses 43 percent of the nation's consumed energy, where Commerce and FEA are drawing up a major energy conservation plan; buildings, where financial incentives could be provided for improved thermal efficiency in existing homes and offices; or, minimum thermal standards could be established for new buildings. To further reduce dependence on oil and gas, actions could be taken to switch to coal or coal-fired electric power.

Under the Base Case in 1985, crude oil production could rise to about 12.8 million barrels a day in 1985 (see chart). Most of the increased production would come from Alaska and the Outer Continental Shelf. Under the Accelerated Supply Case, production could rise to about 16 million barrels a day in 1985, with major increases coming from a million barrels a day of shale oil, Atlantic and Pacific OCS development, and greater development in Alaska and the Naval Petroleum Reserves. It is interesting to note that production of the lower 48 would be less in the Accelerated Supply Case than in the Base Case, because some of the more expensive lower 48 oil would be replaced with the OCS or Alaskan oil.

Coal consumption could grow from 525 million tons (excluding exports) to more than a billion tons in 1985 in the Base Case and over 900 million tons in the Accelerated Supply Case. Accelerated supply consumes less coal than business-as-usual, since under accelerated supply less expensive oil is available for use and nuclear power plant construction is accelerated. The $7 oil case uses less coal than the $11 oil situation since less expensive oil can be used.

While synthetic fuels and shale oil are promising long-term sources of energy, even under the Accelerated Supply Case at $11 oil, FEA does not project more than about 1.25 million barrels a day of oil produced from shale, coal gasification, and coal liquefication. This does not mean, however, that these sources should be forgotten, since in the long run they could be very important.

In its analysis, FEA reviewed a number of important resource constraints that could affect energy supplies. While there were short-term constraints of manpower, water, materials and equipment, the most important long-term constraints are in materials and equipment. Even under assumptions of accelerated availability of certain equipment, fixed and mobile platforms will still be more than 30 percent short. Since this equipment is important to offshore development, action is needed to avoid serious constraints.

Capital available

It is expected that enough capital will be available in the aggregate to support energy investments, although the utility sector in particular will have serious problems in achieving its desired capital flows.

By accelerating domestic supply, at $11 oil, the United States could reduce imports to zero by 1985. While zero imports are possible, FEA does not believe it is a realistic goal since some imports are from secure sources and this country can protect itself against the severe impacts from small disruptions of supply.

Project Independence analyzed a number of conservation options (see chart). Those which achieve the greatest savings in the long-run are fuel standards, disincentives to automobile travel, thermal standards and some industrial measures. In the short-run, however, all of these incentives can provide significant savings and in general, conservation has greater short-term effects than increased supply actions.

Non-oil savings

Conservation measures can reduce imports to about 1.2 million barrels a day by 1985, at $11 oil. While conservation saves the equivalent of over five million barrels a day if all of the possible mandatory actions were taken, all the savings are not related to oil and some would save coal, electricity and nuclear power.

The report emphasizes that the effect of increasing energy costs is felt most severely by the lowest-income groups. Whereas wage earners with incomes above $15,000 a year spend only about 5 percent of their after-tax income on energy, FEA reports those earning under $5,000 a year spend more than 10 percent of theirs. Thus the impact of increased energy prices on certain consumer groups will have to be carefully weighed.

Another option to help reduce U.S. vulnerability is the provision of emergency petroleum storage. As storage is available for use, the GNP costs of an embargo decline considerably, and storage is not very costly. However, storage facilities take time to build, and since this country is most vulnerable in the short-term, purchasing oil for storage could have the effect of maintaining the higher prices.

The policymaking process which is now in effect in the Administration will turn the results of the Project Independence report into a series of major objectives and specific proposals to the Congress early next year.

Industry Comments on Report

Assessments of Project Independence by representatives of 24 major industries were presented to Commerce Secretary Frederick B. Dent at a December 18 meeting of the National Industrial Energy Conservation Council.

This advisory council to the Commerce Department, made up of top executives of companies representing a cross-section of American industry, had been asked to have its members review Project Independence as it might affect their company's operations, and to comment on how realistic and feasible its findings are.

Dr. Betsy Ancker-Johnson, Assistant Secretary of Commerce for Science and Technology, presented new recommendations of the Commerce Technical Advisory Board's Panel on Project Independence Blueprint for a National Energy Program.

In addition, the Advisory Council's sub-council on technology, representing six member firms, presented a six-section report containing energy conservation case histories and other materials that it will present to the Commerce Department for possible use in future editions of the handbook, "Energy Conservation Program Guide for Industry and Commerce (EPIC)." EPIC is a handbook prepared by the Commerce Department's National Bureau of Standards as an energy-management reference tool for small and intermediate-sized firms.

Millionth Trademark Is Registered; 400,000 Currently Valid In U.S.

The United States Government registered its one millionth trademark last Tuesday, December 17, just 104 years after the first federal trademark registration. Commissioner of Patents C. Marshall Dann signed the certificate of registration in the office of Commerce Secretary Frederick B. Dent, as Benjamin and Marvin Eisenstadt, President and Executive Vice President of Cumberland Packing Corporation, Brooklyn, N.Y., owners of the millionth trademark, looked on.

The trademark itself, a simple G clef and staff design familiar to music lovers, identifies the product "Sweet 'n Low", a sugar substitute packaged and marketed by Cumberland Packing.

On the same day 631 new marks joined approximately 400,000 currently valid registrations in the records of the U.S. Patent Office.

"Trademarks frequently have been described as a company's most important and most valuable asset," Commissioner Dann said in connection with the issuance of the millionth trademark registration. "Many businesses would fail, or could survive only through a long and expensive process of creating a new identifier for their product, if they were prevented from using the marks they have used for many years. Marks serve as an indispensable advertising tool for their owners.

"Trademarks also protect the consumer," he added, "by serving as an identification of the source of goods, pinpointing responsibility for quality, and by guaranteeing the consistency of the quality or nature of a product. If quality is good, the owner gets credit. If the quality is poor, he suffers discredit. If trademarks were not placed on merchandise, the manufacturer would have no accountability in the marketplace. The customer would be the victim in such a world. The consumer confidence which a trademark imparts in the case of a good product, or service, can contribute substantially to the development of a stable and orderly economy."

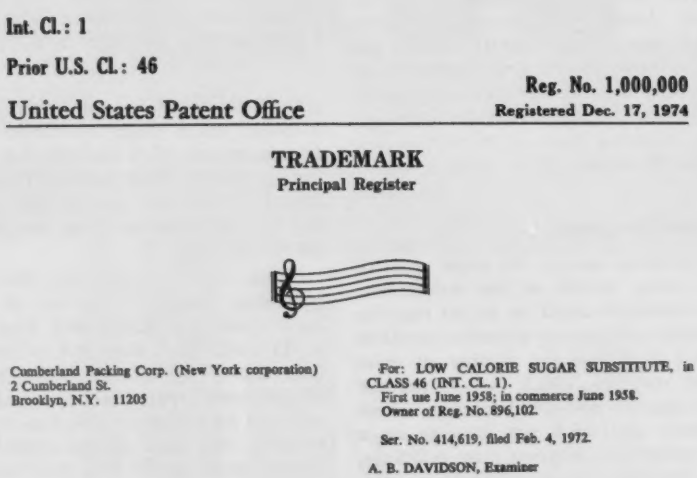
In this period of emphasis on economic growth, the trade symbol or mark is of undeniable importance to both consumer and businessman. Officially, a trademark is defined as "any word, name, symbol or device, or any combination thereof, adopted and used by a manufacturer or merchant to identify his goods and distinguish them from those manufactured or sold by others."

The average American, whose daily life involves confrontation with an estimated 1500 trademarks is greatly affected by their use. Living in a world thoroughly permeated by words and designs, we have been conditioned to recognize these symbols and attach to them the proper literal and connotative meanings.

One sees the bald eagle and envisions the majesty and strength of the United States. The blind goddess balancing the scales represents justice and law, while the dove signifies peace, and the gold medal, victory. Taking full advantage of this widespread disposition towards symbolic depiction, the business community has attempted to create and promote trademarks that will be easily recognized and, in turn, initiate feelings of trust and satisfaction.

The process of selecting an appropriate trademark is of the utmost concern, inasmuch as consumer recognition is the ultimate measure of efficacy. A mark must be eye-catching, understandable, easily pronounced or described, and appropriate; otherwise, the desired mental impression is lost. The possibilities are seemingly endless, limited only by the scope of one's creative imagination.

One individual, George Eastman, seeking a unique name for his newly invented camera, began with an inclination as to the incisiveness of the letter "K," and, presto, "Kodak" was coined. In contrast, others merely adopt existing matter. The Baker's Chocolate Girl, originally a pastel portrait of an Austrian maiden before appropriation over two hundred years ago, stands as a classic example. Buster Brown and his dog, Tige, found their



Int. Cl.: 1

Prior U.S. Cl.: 46

United States Patent Office

Reg. No. 1,000,000

Registered Dec. 17, 1974

TRADEMARK

Principal Register

Cumberland Packing Corp. (New York corporation)
2 Cumberland St.
Brooklyn, N.Y. 11205

For: LOW CALORIE SUGAR SUBSTITUTE, in CLASS 46 (INT. CL. 1).
First use June 1958; in commerce June 1958.
Owner of Reg. No. 896,102.

Ser. No. 414,619, filed Feb. 4, 1972.

A. B. DAVIDSON, Examiner

THE MILLIONTH—*Trademark for a low calorie sugar substitute became the millionth registered with the government last week. Patents Commissioner C. Marshall Dann signed the certificate of registration during special ceremonies in the office of the Secretary of Commerce.*

way to the shoe industry after huge popularity as comic strip figures at the turn of the century. Other trademarks have immortalized ex-sweethearts (Tootsie of Tootsie Roll fame), geological formations, animals of every species and description, as well as countless fanciful designs and clever slogans.

The adoption of the trademark or brand name is only the beginning. The stimulation of goodwill and the accrual of proprietary rights are strictly dependent upon use of the mark in association with goods or services. Without use, a trademark remains as worthless as an unfueled turbine—its potential never converted to productivity. Rights in a mark belong only to the first party to sell and distribute the goods identified by the mark. *Bona fide* use thus generates both common law protection and exposure necessary to stimulate consumer awareness.

In the present economic environment dominated by a multiplicity of goods and services, advertising has achieved unparalleled significance. Without advertising, a promotion of a product would have to rely on word of mouth advancement. Accordingly, the choice of goods available to the consumer would be as restrictive as the means of communication. A user must, within the limits of its advertising budget, attempt to bring its message home to as many prospective purchasers as possible. The natural public awareness of and affinity for symbols and trademarks is exploited by the businessman in an effort to establish buyer recognition. It is hoped that one will recall the advertised trademark and will seek out and try the product. Each successive satisfactory experience reinforces the newly established buying habit, until the trademark actually becomes its own advertisement.

Public service

Ultimately, a trademark must be more than an economic tool benefiting only its owner. Another master, the public interest, must also be served. In addition to indicating the origin of all goods on which it appears and acting as its own salesman, the mark functions as a guarantee of quality. It assures the customer that the next package of cheese or bucket of paint will be of a quality consistent with that last purchased and promises him that a new product will deliver the satisfaction he has come to expect from past associations with other goods bearing the mark. In order to safeguard the public confidence that has been so carefully nurtured, the trademark owner must constantly strive to maintain and improve the quality of all of his products. The owner indicates his pride and confidence in the goods by placing his mark on them for all to see.

The preservation of this sought after goodwill involves more than quality control and demands unceasing vigilance. There is always someone willing to profit from another's hard work and good name. Were a competitor permitted to appropriate all or part of an established mark or to trade on an imitation, the effects could prove devastating. The ordinarily prudent purchaser might be induced to purchase the imitator's goods in the belief that he is actually buying the familiar ones. In other circumstances, although the goods of two parties may be different, they might be assumed to have originated with the same source. When either occurs, the clever imitator has done more than divert sales. Should the goods prove unsatisfactory, the buyer, who receives less than anticipated, places responsibility on the wrong party. Legal action to attain relief and damages may prove necessary.

Examples of such attempts to benefit from another's reputation are numerous. One drug packer, noting the success of two analgesics, "Bufferin" and "Anacin," combined the marks and came up with "Buffacin." Neither the damaged parties nor the court were amused and an injunction resulted. Another company thought that since "Remington" had been so successful in relation to office machines and shavers, it might do wonders for its sewing machines and radios. Here again, the court was of a different opinion.

Just as a business must protect its tangible assets against theft and natural disasters, so must the party take appropriate steps to insure its interest in the trademark. One type of insurance takes the form of a federal registration with the U.S. Patent Office. This non-compulsory action offers considerable benefits. Such registration is available to any owner who sells or ships the goods bearing its mark in interstate or foreign commerce and to those who have advertised and rendered services in such commerce.

The Trademark Act of 1946, commonly known as the Lanham Act, sets forth the guidelines for obtaining a federal registration. The principal requirements are that the mark must not be deceptive or descriptive and that there be no likelihood of confusion with other marks in use. Applications are examined by the Patent Office according to these and other criteria before registration can be granted.

The benefits of registration are primarily procedural. Aside from alerting others as to which marks are in use and, therefore, "taken," the registration offers the owner advantages which assist him in the judicial enforcement of his rights.

Clearly, federal registration of a trademark is both the least expensive and most adequate type of insurance presently available to the business community. The protection it offers is not by any means absolute, but at a cost of $2.25 a year over a 20-year period, it's one of the few bargains left today. More than just protecting individual marks, the registration system helps assure the purchasing public that they will always get the desired product, not an imitation. By strengthening the rights of the legitimate owners and refusing protection to unintentional as well as intentional imitators, the national trademark buying habit and consumer confidence are perpetuated.

Protection of a mark does not end with registration, since exclusive rights that were gained by actual use can be lost if use of the mark is discontinued or if the mark is not properly used. Improper use occurs when the mark becomes so closely associated with the particular product that, rather than indicating origin, the mark is commonly used as the name of the goods. If such misuse is permitted to continue long enough and on a sufficiently broad scale, the business entity might find itself unable to enforce its proprietary interests. It might find itself on the painful end of a judicial holding that the mark has become a generic term incapable of exclusive appropriation. It can and does happen. "Escalator," "thermos," "yo-yo," "trampoline," "aspirin," and cellophane" have all been downgraded at the expense of their chagrined owners.

Guarding against misuse

Many companies spend thousands of dollars annually attempting to stem the tide of such misapplication. One means of policing unfair and incorrect usage involves reading trade journals, newspapers, and dictionaries. All incorrect uses which fail to acknowledge trademark status are noted. The parties responsible are informed of their errors and requested to correct them and avoid repetition in the future. The Xerox Corporation campaign to inform the public that "Xerox" is a trademark and not a synonym for "photocopy." They stress that their mark, a proper adjective, cannot be used as a verb or noun and must always be capitalized. Their request echoes the sentiments of all companies which suffer through all types of misuse: "Please don't take our name in vain."

Each year tens of thousands of business enterprises follow the entire trademark development process. Cumberland Packing Corporation merely stands as one dramatic example of the creation of trademark goodwill. The perpetuation of the public confidence necessitates quality control and vigilant protection against infringement and misuse. The trademark which symbolizes the consumer trust and confidence cements the relationship between the manufacturer and consumer. It must serve both, or it serves neither—there is no middle ground. Thus, the millionth trademark will stand as a milestone in the historic and continually evolving courtship between the two interest groups.

Energy Management Digest

THE SEARCH GOES ON...Reflecting the national effort to uncover new sources of oil, output of oilfield drilling rigs is expected to show a sharp increase in 1975. A total of 104 rigs capable of drilling to depths greater than 18,000 feet are expected to be produced next year, compared to only 54 during 1973. The estimate is 13 above the total reported in a May survey by the Commerce Department. Output of smaller, shallower-drilling rigs is also on the rise: from 53 in 1973 up to 87 next year. All eight rig-producing U.S. companies surveyed expected to have increased capacity by December 1975. Several also foresaw further production rises during 1976. The firms reported that long lead times and uncertain prices on raw materials and equipment are still a major concern. Power units, steel forgings and castings, masts, clutches and roller bearings were mentioned as examples.

DATA SOURCES...The energy crisis has brought forth a small landslide of energy-related books. The Environment Information Center in New York City has contributed five major reference works: The Energy Directory, a 500-page guide to the nation's energy organizations, decision-makers, and information sources, $50; The Energy Index, a select guide to energy documents, laws and statistics, 450pp, $50; The Environment Index, a yearly guide to key literature in the field, 750pp, $75; The Environment Regulation Handbook, with monthly updates, 1,300pp, $95, and Land Use Abstract, a guide to land and water resources information, 450pp, $45. The Center is located at 124 E. 39th St., N.Y. 10016.

OLDIES BUT BADDIES...The so-called modern office building is, in a word, outdated from the energy point of view. It exposes large areas of glass to the sun. Since these absorb heat in much the same way as a greenhouse, and since in most cases the windows cannot be opened to admit fresh air, an elaborate cooling system is needed during the summer. In winter the situation is reversed: the glass walls become a very efficient heat exchanger, draining heat from the building. Naturally this requires an enlarged heating plant which consumes still more energy. The U.S. Government is helping to develop an alternative---a building that will work with nature rather than against it. The new Federal Office Building in Manchester, N.H. has no windows on its northern side, since they are a prime source of energy loss. It uses solar panels to help power more efficient heating and cooling equipment. It has less glass to lose heat in the winter, but its windows can be opened to take advantage of breezes during warm weather Finally, it has a series of movable screens which protect the windows from the sun during the summer and wind-induced heat loss during the winter. Coupled with reduced office lighting levels these design innovations will enable this building to operate on about 70 percent of the energy of a "normal" building.

IMPORTING IDEAS...Since the energy shortage is a worldwide problem, the United States is looking abroad for ideas that could be applied to the U.S. situation. Much of the research and development cooperation with other nations is concerned with short-term problems such as safer and more efficient coal mining technology, radioactive waste management, and the safety of nuclear installations. Energy conservation also gets heavy attention, and one of the more interesting bits of information gleaned so far is a West German plan for a national central-heating system that could save 25 percent of that nation's current energy consumption by the turn of the century.

POOR GET ENERGY VOICE...A new Office of Consumer Affairs/Special Impact in the Federal Energy Administration will take a special interest in the energy problems of the more vulnerable economic groups in the country: the poor, the handicapped, and the aged. Surveys indicate that: The poor use much less energy than others; a greater proportion of their income is spent on energy use; they pay higher prices for energy; and housing for the poor in most cases does not have features and equipment that save energy. According to a survey conducted by the Washington Center for Metropolitan Studies, impoverished households use less electricity and natural gas than other households, but pay 7½ percent more per unit. In many jurisdictions utility rates decline with increasing purchases, in order to encourage usage. "Cheaper by the dozen" pricing, however, does not help the poor who use energy only for necessities.

Attack On Fire Fatalities Waged By Actions Involving Burning Plastics, Sleepwear

Studies aimed at reducing the vast majority of building fire fatalities which are caused by smoke and combustion of gases rather than burns are being funded by three Commerce grants totaling $328,000. The studies have possible far-reaching effects on the materials that go into U.S. products.

The grants have been awarded by Commerce's National Bureau of Standards to Johns Hopkins University and the Universities of Pittsburgh and Utah. They are:

- $116,000 to Johns Hopkins for a study by its Applied Physics Laboratory (APL) to obtain information on the detailed causes of death of fire victims, particularly those due to "smoke inhalation."
- $137,000 to the University of Pittsburgh for research on the evaluation of toxicological effects of smoke and vapors from a variety of burning plastics.
- $75,000 to the University of Utah for evaluation of the smoke hazards of fire-retardant plastics commonly used in buildings and furnishings.

When combined, information from the three research projects is expected to yield greater understanding of combustion product hazards. Recent studies indicate that it is this peril, rather than the direct effects of heat, which is responsible for up to 90 percent of building fire fatalities.

The Johns Hopkins team will assemble data from pathological, microscopic and toxicological investigations of an estimated 120 fire victims. These data will be coupled with pertinent fire-related information concerning fire causes, fire spread, and materials involved to attempt to relate the nature of the burning materials to the detailed cause of death. John Hopkins' APL's program dealing with human pathology will be complemented by chemical analysis and controlled testing conducted at Pitt and Utah.

Researchers at Pittsburgh will determine the relative hazard of plastics by comparing the sensory irritation of laboratory rats exposed to the combustion products. In contrast to previous toxicology tests which have used the death of the animals as the sole measure of the hazard, the study at Pittsburgh will measure the rats' responses to low-level, sub-acute doses of smoke.

Concurrently, the Utah team will evaluate the toxicological effects of combustion products from fire-retarded plastics. They will screen plastic materials which are commonly used in buildings and furnishings. In contrast to the Pittsburgh project, they will observe general behavior and specific acute toxic effects on laboratory rats such as respiratory distress, unconsciousness, convulsions and death.

These research efforts reflect the increasing roles of smoke as a recognized fire hazard and of plastics as a major source of that hazard. Scientific observation of the effects of smoke and toxic gases will provide a basis for ranking materials according to the hazard they present.

In a related development, technical work performed by Commerce's National Bureau of Standards was the basis for a mandatory federal standard for older

THE REAL PERIL—*Studies indicate that the smoke from burning plastics may be a much greater danger than heat and smoke originating from other sources. Commerce research grants will help three universities seek to discover the extent to which this is true.*

children's sleepwear recently issued by the U.S. Consumer Product Safety Commission.

The new standard, designed to reduce the injuries and loss of life caused when sleepwear worn by children ages 6 to 12 catches fire, takes effect May 1. It requires that all sleepwear, sizes 7-14, manufactured on or after that date not exceed certain limits of flammability.

The NBS study which recommended this standard found that children between the ages of 6 and 12 are as susceptible to sleepwear fires as are those under 6, for whom a mandatory federal flammability standard already exists.

NBS also found that kitchen ranges are the most frequent ignition source for this age group, with girls involved much more frequently than boys.

The report states that almost one fourth of incidents in NBS' Flammable Fabrics Accident Case and Testing System (FFACTS) in which sleepwear was the first item ignited involved children in the 6-12 group, while another one-fourth involved children under age 6. These facts led NBS to recommend to CPSC that 6-12 year olds be afforded protection similar to that which the 0-5 age group now receives under the federal flammability standard already in effect.

The fact that many more females than males are involved in sleepwear fires is a pattern that begins with 6-12 year olds and continues throughout all higher age groups. Girls were involved almost four times as frequently as boys in the FFACTS sleepwear incidents for the 6-12 age group. This differs from the more nearly equal proportion found in the 0-5 group.

Full scale mannequin studies of fabrics similar to those found in FFACTS were conducted at NBS. The studies revealed that flames spread over a child's entire garment very rapidly—between 20 and 30 seconds after ignition—and account for the high degree of injury sustained from sleepwear ignitions.

Fifty-two of 74 victims in the 6-12 group on whom information was available to FFACTS required hospitalization, while five others died. The report concludes that many of these children would not have been severely burned had the sleepwear they were wearing been flame retardant.

Also included in this report are findings from NBS tests on fabric remnants involved in sleepwear incidents and an examination of the fire hazards of exposing nightgowns to such heat sources as space heaters and fireplaces.

Printed copies of "Fire Incidents Involving Sleepwear Worn By Children Ages 6-12," NBS Technical Note 810, may be ordered for 50 cents from the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402. Request SD Catalog No. C13.46:810.

A HOUSEHOLD WORD . . . FIRE!—*It applies to more than 5.5 million households which have unintentional fires each year. Home appliances are blamed for starting almost 3.5 million.*

Household Fires At 5.5 Million Level Per Year

The United States had an estimated 5,575,000 household and personal property fires in the twelve-month period ending last April, according to a fire survey sponsored jointly by Commerce's National Bureau of Standards and the U.S. Consumer Product Safety Commission.

The survey was attempting to develop for the first time a statistically accurate estimate of the extent of the fire problem in American households. Of the 5,575,000 fires, 4,547,000 were started in the home and the remainder occurred in vacation homes, automobiles, boats and other buildings on private property.

About 326,000 people were injured in fires during the year, 141,000 of them in residential fires. Property loss was estimated at $1.5 billion involving 2.4 million fires. In 2.9 million incidents no losses were reported.

Home appliances were the cause of ignition in almost 3.5 million cases, led by electric stoves (855,000), gas stoves (360,000) and television sets (196,000).

The next most common ignition source was electrical wiring, in 435,000 cases, of which 167,000 occurred in the home. Smoking started 365,000 fires, followed by matches in 248,000 cases.

The first items to ignite were food and grease in 1,874,000 cases and appliances in 1,242,000 cases. Fabric fires, including interior furnishings, bedding and clothing, ignited first in 628,000 incidents.

Included in the 285,000 interior furnishing fires were carpets and rugs (142,000), upholstered furniture (124,000) and drapes and curtains (19,000). Bedding was involved in 115,000 fabric fires including blankets and bedspreads (69,000) and mattresses (33,000). There were some 159,000 clothing fires and other fabric items constituted the remaining 69,000 fabric fires.

The survey was conducted by the Commerce Department's Bureau of the Census during the week of April 15, using 33,000 civilian households comprising about 100,000 persons. The respondents were asked to recall any fire which had been unintentionally started on their personal property during the preceding year.

Except for the number of people injured, the survey excluded fires in government buildings, office buildings, public places and common areas such as apartment hallways. The figures were extrapolated to reflect the extent of the household fire problem on a national scale.

Future fire injury statistics will be compiled for National Fire Data Center to be established by Commerce's new Fire Prevention and Control Administration.

Capital Spending Plans Not Likely To Provide An Economic Stimulus

Business plans call for capital spending to rise 3.2 percent in the first quarter of 1975 and 1.2 percent in the second, according to a survey conducted in late October and November by Commerce's Bureau of Economic Analysis. Such an increase is not likely to provide a strong impetus to the economy. Actually, inflation could wipe out any positive effect of the gain.

Capital outlays in the first half of 1975 are projected at $118.8 billion (seasonally adjusted annual rate), 8½ percent above the first half of 1974 and 4 percent above the second half.

Capital spending in the third quarter reached $114 billion. That was a 2.3 percent increase compared with the 3.8 percent second quarter increase. Spending planned for the fourth quarter of 1974 is expected to increase about one-half of 1 percent.

The capital expediture figures produced by the survey are not adjusted for price changes. Capital goods prices rose about 6 percent from the first quarter to the third. If businessmen expect this trend to continue and have reflected such price increases in their latest spending projections, real investment will decline in the second half of 1974 and the first half of 1975.

Spending for the full year 1974 is expected to rise 12.2 percent to $111.9 billion, little changed from the 12½ percent increase reported in the August survey. Spending increased 12.8 percent in 1973 and 8.9 percent in 1972.

Among manufacturing industries, expenditure plans were raised during 1974 by the primary metal, chemical, and petroleum industries, and were reduced by the transportation equipment, stone-clay-glass, and paper industries.

In nonmanufacturing, expenditure projections for the year have been raised by railroads and commercial firms, and reduced by airlines, "other transportation" and gas utility companies. Third quarter spending was about 1 percent higher than projected in the August survey but the fourth quarter projection has been lowered by 1½ percent.

The planned 4 percent increase in capital spending from the second half of 1974 to the first half of 1975 is attributable to the manufacturing industries, which expect to increase outlays by 9½ percent.

Nondurable goods manufacturers expect to increase spending 14 percent, with large increases by the paper, chemical and petroleum industries; these are partially offset by a decrease in spending in the rubber industry.

The increase of 4½ percent for durable goods producers is largely attributable to primary metal companies. Outlays are expected to be lower in the first half of 1975 than in the second half of 1974 in the machinery and motor vehicle industries.

Among the nonmanufacturing industries, substantial increases in spending in the first half of 1975 are expected by airlines and gas utilities, but there are offsetting decreases in the commercial group.

Inflation's Role

"The uneven pattern of projected outlays for plant and equipment show clearly that investment incentives are essential to the restoration of non-inflationary growth in the economy," said Secretary of Commerce Frederick B. Dent.

"It is encouraging that business plans to increase its dollar outlays for plant and equipment despite the general decline in economic activity," Dent said. "However, because of inflation, it appears that the projected level of expenditures will add little, if any, stimulus to the economy in the first half of 1975.

"The impact of inflation is apparent. Prices on total capital investment rose 3.3 percent in the third quarter of this year compared with 1.5 percent in the third quarter of 1973. The third quarter of this year was the first in four years to show a decline in total fixed investment after adjustment for inflation," the Secretary reported.

Largely Unsuccessful Effort To Predict Consumer Buying Habits Described In Report

A history of the Census Bureau's recently discontinued program to measure consumer buying expectations is the subject of a technical paper (No. 36) just issued by the Commerce Department agency.

The paper traces the development of federal programs to measure consumer anticipations from a 1946 survey sponsored by the Federal Reserve Board to the recent quarterly Survey of Consumer Buying Expectations. A number of analytical studies concerning the predictive value of survey data are reviewed, along with an explanation of the reasons why the Census Bureau discontinued the Survey of Consumer Buying Expectations. The weak predictive value and large relative standard errors of the survey measures of expected purchases caused the discontinuation.

Facsimiles of questionnaires and a set of tables showing series on consumer expectations for the period 1959-73 are also shown. Although there are no longer any federal programs which survey consumer purchase expectations, the 69-page paper notes that such data, as well as information on economic attitudes continue to be provided on a frequent basis from other sources.

Technical Paper 36 is available for $1.80 per copy from the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402, and Commerce Department district offices in major cities.

Canadian Tourists Can Take More U.S. Goods Home

Canadian tourists can now take more duty-free goods home with them. An increased exemption on foreign purchases by returning Canadians is expected to boost U.S. retail sales to Canadian visitors by more than $30 million a year.

Most Canadian visitors fully utilize their duty-free allowances, especially on short shopping expeditions to U.S. border cities, where prices generally are lower and a wider selection is available.

Under new regulations now in effect, the quarterly duty-free exemption for purchases by Canadian tourists returning to Canada after an absence of at least 48 hours rises from $25 to $50.

The annual exemption, granted once a year to tourists taking longer trips out of Canada, rises from $100 to $150, with the required length of time out of the country reduced from 12 days to seven.

The latest available annual statistics showed almost 30 million Canadian visits to the United States in 1972, during which more than $796 million was spent. Almost six million of the visitors stayed from two to seven days and 2.8 million stayed eight days or more. About 21 million stayed less than 24 hours.

The change in Canadian tourist allowances, long sought by the U.S. Government, brings Canada's practices more in line with U.S. tourist regulations. More than 35 million U.S. residents visited Canada in 1972 and spent slightly more than $1 billion there.

Details of the changed Canadian tourist regulations may be obtained from any Commerce Department district office.

Industry Highlights

Metal Cutting, Tool And Die, Welding Industries See Gains

(Industry Highlights is prepared by the Office of Business Research and Analysis, Bureau of Domestic Commerce.)

Other segments of the U.S. metalworking industry, in addition to the machine tool industry highlighted in the Dec. 9 issue of *Commerce Today* are expecting banner years in 1975.

Metal Cutting Tools. Stimulated by worldwide business spending for new plants and equipment, the mini-boom in metal cutting tool sales which started in 1973 is expected to continue well into 1975 and beyond, although at a somewhat slower pace. In 1974, order levels far exceeded orders of a year earlier, and backlogs were high. Demand is strong from such diverse markets as aerospace, trucks, off-the-road vehicles, farm machinery, and the oil industry.

Prospects for the metal cutting tool industry for the next several years are very favorable. By 1980, cutting tool sales are expected to reach $1.8 billion, reflecting an annual growth rate of 10.5 percent, according to Paul Sacharov of the Transportation and Capital Equipment Division.

Product shipments are thought to have reached a record high of $990 million in 1974, and a further 16 percent increase is anticipated in 1975. However, capacity pressures, supply problems, and rising prices may slow the rate of growth.

Because demand remained strong, anticipated slowdowns of cutting tool orders in 1974 did not materialize. Shipments of perishable cutting tools scored substantial gains during 1974, although slightly below the 1973 rate of increase. Shortages of materials and skilled workers continued to delay shipments for days and even weeks in mid-1974. High-speed steel and tungsten continue in tight supply.

Increasingly, manufacturers recognize that the use of many new cutting tool materials results in significant reductions in manufacturing costs and increased productivity. For example, polycrystalline inserts of cubic boron nitride (Borazon) are finding applications in machining the very difficult-to-machine jet engine alloys. The addition of titanium oxide or carbide has significantly improved the strength of ceramic tools. Sintered polycrystalline diamond tools are opening new areas of application for turning with diamonds and are useful for machining fiber-glass and other plastic materials. Recent developments in reactive ion plating techniques produced a new superhard titanium carbide-coated cutting tool with a knopp hardness of 5500 (diamond 7000), which shows promise of increasing productivity, tool life, and machining capabilities.

Use of these newer tools has reduced shutdowns for tool changes because of reduced tool wear and has increased feedrates and surface cutting speeds, raising productivity and cutting machining cost.

Most manufacturers are operating at or near capacity. Despite heavy overtime or third-shift operations, lead time for delivery was extended to 24 weeks in 1974 compared to 10 to 12 weeks a year earlier. New plant additions are urgently needed to meet the high level of new orders.

However, the need for additional manpower to operate new facilities could pose problems, since skilled workers who were laid-off in 1970-72 are no longer available. In an effort to increase production, manufacturing tool plants are activating training programs to upgrade machine operators, and, at the same time, are expanding capacity in old plants or building new facilities.

Although cutting tool manufacturing is a highly competitive business, spiraling material and labor costs suggest cutting-tool prices will probably rise further.

Tool and die products. Output of the independent or contract tool and die industry is expected to continue on the upward trend that has been in evidence since 1972. Shipments in 1975 should top $3 billion.

The move toward specialization in the tool and die industry continues, with an increasing number of shops entering the field of special equipment, proprietary end-products, subcontract work, and the design and construction of complete manufacturing or assembly lines, reports Robert A. Ricciuti of BDC's Transport and Capital Equipment Division. As a result, the average tool and die shop is slowly swinging away from the traditional concept of a shop and is growing less dependent on what used to be considered bread-and-butter items. The diversification of products and services is contributing greatly to the industry's growth and accounting for an ever-increasing share of its total output.

By 1980, sales of the independent tool and die industry should reach $4.5 billion, an annual average growth rate of 7.3 percent, and shipments of tools and dies by all industries will approximate $4.6 billion.

More rapid growth of the industry is expected in the 1980s, particularly in light of the nation's effort to become self-sufficient in meeting its energy needs. The tooling requirements of Project Independence will play an important role.

Demand for the goods and services of the independent tool and die industry increased significantly during the past year, due to several factors: the automotive industry's new tooling requirements for compact and sub-compact models to be introduced in the 1975-76 model years; increased demand for construction and farm equipment, as well as for mass transportation equipment and consumer appliances; and the requirements for oil-producing equipment. Backlogs, which normally average four to eight weeks, are now reaching one year or more and in many instances are expected to stretch out even farther as more orders for complex assembly lines are received.

Although still a problem throughout the industry, the short supply of skilled labor has been relieved by the industry's successful promotion efforts to attract young workers into apprenticeship programs.

Foreign markets are expected to play an increasingly important role in the welfare of the industry as manufacturers continue to enter new markets. Contracts to design and build complete plants for the manufacture of flatware have been negotiated with the Soviet Union, and this has stimulated the industry's efforts to find new markets all over the globe.

Welding apparatus. Although the welding apparatus industry is beset by material shortages problems, difficulties in recruiting skilled workers, and rising costs of energy and other moterials, 1975 should still be a banner year due to high levels of demand by construction industries and fabricators of energy-producing equipment and consumer products. Shipments of welding equipment in 1975 are expected to reach $1,040 million, a 12 percent increase, in Sacharov's view.

In 1974 the three basic segments of the industry showed varying gains over 1973. Gas welding and cutting apparatus shipments increased about 10 percent to a value of $110 million; electric welding equipment shipments amounted to $820 million, an increase of almost 19 percent, and arc welding equipment shipments totaled $335 million for machinery and $320 million for filler materials, gains of 20 and 23 percent, respectively. Resistance welding equipment increased 12 percent to $145 million. Contributing to this better-than-average growth is the increased commercial usage of the newer welding processes such as plasma, electron beam, laser, and inertia welding.

Emphasis on increased productivity by user industries will assure a continuing high level of demand for welding apparatus during the next several years. From 1974 to 1980 shipments of welding equipment are expected to increase 7.7 percent annually and reach $1,450 million.

State Tax Collections Up 8.9%; Sales Levies Lead

State tax collections in fiscal 1974 totaled $74.1 billion, an increase of 8.9 percent over the $68.1 billion of fiscal 1973.

Commerce's Bureau of the Census reports that sales and gross receipts taxes continue to be the leading tax revenue source for states, amounting to $40.5 billion in 1974, or 54.7 percent of the total.

The second largest source of state tax revenue is the individual income tax collected in 44 states. In fiscal 1974, these totaled $17 billion, up 9.2 percent from 1973. Corporate net income taxes were $6 billion, up nearly 11 percent over 1973.

State motor fuel taxes increased by only 1.8 percent in fiscal 1974 compared with an 11.7 percent rise from fiscal 1972 to 1973, reflecting the energy problem.

Twelve states had tax revenue increases of 15 percent or more over 1973, while only six states showed an increase of less than five percent. Connecticut was the only state with a net decrease. This resulted from a change in the base of the individual income tax, along with a reduction in the general sales tax.

Along with major tax sources, the Census Bureau study includes individual state comparisons; trends in state tax collections for the years 1971 to 1974; rates of selected major taxes in all states; and details of state tax yields.

Copies of the report, "State Tax Collections in 1974," GF74, No. 1, may be obtained for $1.05 from the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402, or from Commerce District Offices in major U.S. cities.

State Tax Revenue, By Type of Tax: Fiscal 1974

(Thousands of dollars)

State	Total	Sales, gross receipts	Licenses	Individual income	Corporate income	Property	Death and gift	Severance	Document, stock trans.	Other
Number using tax..	50	50	50	44	46	44	49	29	27	15
All States	**74,135,054**	**40,546,536**	**6,058,895**	**17,015,208**	**6,015,408**	**1,301,495**	**1,425,350**	**1,254,198**	**494,210**	**23,754**
Alabama	1,017,367	677,788	77,191	169,801	47,255	26,447	6,210	8,627	4,048	n.a.
Alaska	124,162	27,237	20,195	49,219	8,241	n.a.	112	17,515	n.a.	1,643
Arizona	743,201	466,695	46,739	137,698	39,356	47,607	5,106	n.a.	n.a.	n.a.
Arkansas	605,419	378,182	51,719	117,022	45,916	1,416	1,093	6,528	1,502	2,041
California	7,971,715	4,113,822	450,778	1,803,080	1,046,031	322,532	232,935	2,537	n.a.	n.a.
Colorado	797,599	407,560	57,011	250,527	52,745	3,181	23,304	1,108	n.a.	2,163
Connecticut	1,091,966	806 989	72 095	18,796	139,873	n.a.	54,213	n.a.	n.a.	n.a.
Delaware	308,133	70,259	92,964	108,488	23,467	394	4,606	n.a.	7,955	n.a.
Florida	2,793,973	2,093,264	262,545	n.a.	188,778	62,740	40,943	15,666	130,037	n.a.
Georgia	1,519,784	956,344	70,482	340,040	132,629	5,099	9,887	n.a.	4,425	878
Hawaii	494,870	314,405	6,861	151,733	18,166	n.a.	2,661	n.a.	1,044	n.a.
Idaho	256,086	125,244	31,525	72,032	23,076	372	3,645	192	n.a.	n.a.
Illinois	4,082,987	2,336,079	346,248	1,046,675	266,944	3,861	79,568	n.a.	3,612	n.a.
Indiana	1,668,731	1,181,052	101,550	322,619	15,400	25,111	22,684	315	n.a.	n.a.
Iowa	987,039	466,778	115,279	317,938	60,346	113	25,121	n.a.	1,464	n.a.
Kansas	702,709	393,004	60,369	147,143	76,766	12,503	12,220	704	n.a.	n.a.
Kentucky	1,106,130	643,540	61,398	212,324	83,364	33,681	16,217	53,749	1,857	n.a.
Louisiana	1,319,521	655,225	92,876	99,956	67,603	163	13,352	390,346	n.a.	n.a.
Maine	336,347	238,161	32,539	39,033	13,202	6,300	7,112	n.a.	n.a.	n.a.
Maryland	1,577,269	743,097	90,555	572,842	90,065	50,047	13,297	n.a.	14,695	2,671
Massachusetts	2,204,744	784,366	93,573	971,030	283,634	461	63,878	n.a.	7,802	n.a.
Michigan	3,681,154	1,890,143	371,364	965,704	309,122	104.271	38.208	2.342	n.a.	n.a.
Minnesota	1,842,728	754,027	117,753	701,389	190,336	2,576	33,859	29,394	5,975	7,419
Mississippi	736,055	557,120	52,277	72,108	30,065	3,201	3,443	17,841	n.a.	n.a.
Missouri	1,266,219	766,445	141,254	284,660	54,683	3,802	15,375	n.a.	n.a.	n.a.
Montana	219,984	65,893	20,948	79,029	15,736	22,507	5,697	9,822	n.a.	352
Nebraska	405,615	256,858	44,501	79,334	21,949	482 (est.)	940	722	829	n.a.
Nevada	251,415	194,787	39,213	n.a.	n.a.	16,581	n.a.	156	678	n.a.
New Hampshire	165,164	94,266	26,297	8,344	23,881	5,391	5,766	105	1,053	61
New Jersey	2,043,970	1,346,302	304,747	31,703	197,591	75,313	88,314	n.a.	n.a.	n.a.
New Mexico	437,674	275,068	28,331	57,946	16,160	13,833	2,373	43,963	n.a.	n.a.
New York	8,516,363	3,438,029	397,228	3,431,993	874,379	17,684	145,080	n.a.	211,970	n.a.
North Carolina	1,806,338	932,107	154,734	504,319	153,289	30,622	31,148	n.a.	n.a.	119
North Dakota	218,693	125,718	25,947	45,435	14,526	1,463	1,246	4,358	n.a.	n.a.
Ohio	2,788,875	1,736,886	326,474	419,174	190,584	84,219	27,437	4,101	n.a.	n.a.
Oklahoma	777,522	387,087	106,846	120,773	40,386	n.a.	22,366	96,980	1,873	1,211
Oregon	701,616	134,745	105,266	352,396	85,734	56	20,375	2,824	220	n.a.
Pennsylvania	4,609,140	2,235,822	493,154	1,115,612	540,103	46 046	127,890	n.a.	50.513	n.a.
Rhode Island	333,653	191,492	18,583	73,898	34,610	4,258	10,309	n.a.	503	n.a.
South Carolina	901,540	572,399	44,136	192,712	77,568	2,723	5,911	n.a.	6,091	n.a.
South Dakota	165,626	143,273	17,251	n.a.	1,299 (est.)	n.a.	3,803	n.a.	n.a.	n.a.
Tennessee	1,091,595	760,214	157,463	16,464	112,974	n.a.	29,845	n.a.	11,751	2,884
Texas	3,287,923	2,248,159	412,760	n.a.	n.a.	50,811	50,203	525,990	n.a.	n.a.
Utah	363,095	216,340	24,180	90,032	20,173	3,409	3,669	5,292	n.a.	n.a.
Vermont	179,503	93,361	19,530	52,662	8,024	500	2,922	n.a.	1,618	886
Virginia	1,507,852	780,415	96,935	468,967	106,406	16,559	19,728	694	17,887	261
Washington	1,359,740	1,128,362	97,141	n.a.	n.a.	91,549	33,874	6,817	1,997	n.a.
West Virginia	610,107	446,700	40,962	99,563	12,744	519	8,088	n.a.	1,515	16
Wisconsin	2,032,119	811,989	114,527	802,995	160,229	91,295	48,215	421	1,297	1,151
Wyoming	124,024	83,438	24,601	n.a.	n.a.	9,797	1,102	5,086	n.a.	n.a.

Leading Black Industries: 1972

Industry group	Firms	Receipts (million dollars)
Automotive dealers and service stations	7,287	951
Food stores	12,271	649
Eating and drinking places	15,154	537
Special trade contractors	16,352	535
Miscellaneous retail	16,441	487
Wholesale trade—durable goods	1,236	449
Personal services	35,473	355
Wholesale trade—nondurable goods	318	300
Trucking and warehousing	10,187	294
General building contractors	3,166	232

Black-Owned Businesses Record Major Gains In Numbers, Sales

Although still a small fraction of the total of American business, black enterprise is forging ahead. There were thirty-two thousand more black businesses in operation in the U.S. in 1972 than in 1969, a 19 percent increase, according to the first of several new reports on minority-owned businesses released by Commerce's Bureau of the Census.

Reports on other minority-owned firms, including businesses owned by persons of Latin, Oriental, and American Indian descent, will be issued in the near future.

Gross receipts in 1972 from a total of 195,000 black business enterprises amounted to $7.2 billion, a 60 percent increase over the 1969 estimated total of $4.5 billion from the estimated 163,000 black enterprises in business at that time. The data are not adjusted for price rises.

The report shows that in 1972 black-owned firms remained highly concentrated in retail trade and selected services, much as they were in 1969. These enterprises accounted for 64 percent of all black-owned firms and 56 percent of their gross receipts, and showed the greatest increases in actual numbers of firms and receipts.

There were 56,617 black-controlled firms in retail trade with gross receipts of $2.9 billion in 1972, compared to 45,220 with gross receipts of $1.9 billion in 1969. There were 68,469 firms in selected services, with gross receipts of $1.1 billion compared to 56,077 firms with gross receipts of $663 million in 1969.

From 1969 to 1972, the greatest percentage increase in the total of firms occurred in manufacturing and transportation. Manufacturing firms increased to 4,116 from 2,981 (38 percent) and firms engaged in transportation increased to 21,738 from 16,733 (30 percent).

The greatest percentage increase in receipts was shown in transportation and wholesale trade. Receipts for transportation firms increased to $425.5 million in 1972 from $210.8 million in 1969 (102 percent). In wholesale trade, receipts increased to $764.2 million in 1972 from $385 million in 1969 (98 percent).

Some 36 percent of black-owned firms (accounting for 36 percent of the $7.2 billion in gross receipts) were concentrated in five states in 1972—California, Illinois, New York, Texas, and Ohio. California—with 19,282 black-owned business enterprises and gross receipts totaling $704 million in 1972—was the leading state both in number of black enterprises and total of receipts.

The New York Standard Metropolitan Statistical Area (SMSA) ranked first among metro areas in total of black businesses, with 11,282 enterprises in 1972. The next four SMSA's ranked by total of enterprises were: Los Angeles-Long Beach, 11,057; Washington, D.C., 9,726; Chicago, 9,718, and Philadelphia, 6,278.

Chicago, however, led in gross receipts with $533.6 million. New York was second with $363.7 million, and Los Angeles-Long Beach third with $358.5 million.

The majority of black-owned firms operate as sole proprietorships. In 1972 the report found that 182,530 firms, or 93.6 percent of the total, were sole proprietorships. This group accounted for 57.8 percent of gross receipts. In 1969, a total of 91 percent of black-owned firms were sole proprietorships.

In 1972, the 4,034 black-owned corporations made up 2.1 percent of all black firms and accounted for 30.9 percent of gross receipts. Some 8,422 black firms, or 4.3 percent, were partnerships and accounted for 11.3 percent of gross receipts.

The average receipts for black-owned corporations with paid employees were $577,000. This compares to average receipts for partnerships of $159,000, and for sole proprietorships of $93,000.

Single copies of the report, *Minority-Owned Businesses—Black* MB72-1, may be purchased for $3.45 from the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402, or from Commerce District Offices.

Economic Slide Perils Minority Business Gains

The hard-won gains which minority-owned firms have made in recent years are endangered by the U.S. economic downturn, and the newer the firm, the more vulnerable they are.

Alex Armendaris, director of Commerce's Office of Minority Business Enterprise, told a Colorado Springs, Colo., audience recently that there has been a steady rise in minority sales to both the government and private markets since the formation of his agency in 1969. He said that minority entrepreneurs have been attracted to the market place in recent years by the increased availability of financing and management assistance.

"Today there are 68 Minority Enterprise Small Business Investment Companies with over $30 million in private capitalization in operation around the country. These have helped to provide venture capital and technical assistance to hundreds of minority firms."

But he cautioned that current business conditions will test many of the newer minority firms. "Established minority businesses should weather the crisis. Our concern is with the firms which are just now getting on their feet. It is harder for them to withstand inflationary pressures because they have less cash available and credit is harder to find," Armendaris explained.

He said that OMBE, which operates a nationwide network of minority business assistance centers, has geared up to help businessmen meet individual problems. Among special measures to meet the situation, Armendaris pointed out President Ford's recent signing into law of measures authorizing the Small Business Administration to make loans available to small firms seriously affected by the energy situation.

Minorities Get $6 Million Slice Of Shipyard Pie

U.S. shipyards awarded contracts worth more than $6 million to minority firms during the first nine months of 1974.

"The industry's response to the Maritime Administration's Minority Business Enterprise Program has been impressive," said Robert J. Blackwell, Assistant Secretary of Commerce for Maritime Affairs. "Especially when one considers that, when we started the program less than a year

ago, minority firm contracts were nearly at zero."

Working together with a sister Commerce agency, the Office of Minority Business Enterprise, MarAd developed a program to foster greater opportunities for minority entrepreneurs in the maritime field. A directory identifying minority vendors and subcontractors with maritime capabilities was compiled by MarAd's regional offices and distributed to American shipbuilding and ship operating companies. In addition, MarAd encouraged these firms to patronize minority contractors, and alerted minority firms to the opportunities in the maritime field.

Three U.S. shipyards have won commendations for awarding contracts worth more than $600,000 to minority business firms. Singled out for their participation in MarAd's Minority Business Enterprise Program were Avondale Shipyards of New Orleans, General Dynamics Corporation-Electric Boat Division of Groton, Conn., and National Steel & Shipbuilding Company of San Diego.

During the first three quarters of 1974, Avondale awarded more than $1.5 million in contracts to A-C Welding Company, a Mexican-American firm which supplies welding rods and equipment.

General Dynamics-Electric Boat awarded 162 contracts to 23 minority vendors. The greatest dollar volume of business went to All-Stainless, Inc., a distributor of stainless steel fittings and fasteners. After this initial contract with MarAd's program, this black-owned company made sales to shipyards on all coasts enabling it to double its business volume.

National Steel provided technical and engineering assistance to Derl Manufacturing Co., a black firm from which it has purchased more than $100,000 worth of ladders. The yard's total contract awards to minority firms topped $600,000 during the first three quarters of 1974.

New Directory Lists Minority Producers

A new National Directory of Minority Manufacturers has been published by Commerce's Office of Minority Business Enterprise to serve corporate purchasing agents seeking minority suppliers.

The 90-page directory is organized by SIC code. Separate indexes include alphabetical listing of minority manufacturing firms with SIC; geographical index by city within state; and federal supply classification.

Limited copies are available from: OMBE Information Center, U.S. Department of Commerce, 14th and Constitution Ave., NW., Washington, D.C. 20230.

New Minority Firms Need Fair Access To Goods In Short Supply

A "positive policy" of supplying newer minority purchasers who are able to pay, so that they get "even-handed" access to goods in short supply has been endorsed by Under Secretary of Commerce John K. Tabor.

Tabor said, ". . . in connection with shortages, which have been a substantial contributing cause to inflation, the newer minority business often finds that the supplier, who is allocating limited supplies, naturally favors older customers.

"As Chairman of the Interagency Council for Minority Business, I call upon suppliers across America to make an extra effort, a positive policy of supplying the newer minority purchaser who is able to pay," he said. "He or she is entitled to an even-handed policy of access to limited supply, for the long-term good of supplier and purchaser alike, and for the health and openness of the private enterprise system."

Under Secretary Tabor, as Chairman of the U.S. Government's Interagency Council for Minority Business Enterprise, was keynote speaker for the Fourth National Minority Business Opportunity Committee Conference, being held in Minneapolis.

Boosts minority role

The Interagency Council for Minority Business has representatives of all Cabinet Departments and Administrative Agencies. Its purpose is to maximize minority participation in the business done by the United States Government in such fields as procurement, the leasing of concessions in federal facilities, Federal Government construction contracts, and participation by minority businesses in federal funds transferred to other municipalities.

The Minority Business Opportunity Committees (MBOC's) are regional or district councils of Federal Government departments and agencies, which implement the goals of the Interagency Council at the local level.

Tabor also called for harder work by MBOC's to assist minority businesses get credit, saying:

"Most minority businesses are new businesses. Therefore, it is harder for them to withstand inflationary pressures than older, more established enterprises. Minority, newer businesses have less cash available, and credit is harder for them to find.

"This requires MBOC's to work harder to assist that minority businessman, to find the needed credit, or to close a needed procurement contract or other contract, which can be the basis for credit."

The Under Secretary noted that United States Government procurement from minority businesses had increased to $746 million last year and remarked on the inclusion of a number of multimillion dollar contracts in this past year.

First Puerto Rican Shopping Center Planned In Bronx

A Puerto-Rican controlled non-profit business organization funded by Commerce's Office of Minority Business Enterprise has announced plans to develop a major shopping center in the heart of the Bronx.

The New York City Housing Development Administration has designated OMBE-sponsored South Bronx Puerto Rican Development Corporation as sponsor-developer of the 90,000-square-foot site. The project will be financed by private and investment capital.

The South Bronx Puerto Rican Development Corporation is a private resource program seeking to stimulate minority business opportunities. It also provides management and technical assistance through professional and trade associations.

Alex Armendaris, OMBE's Director, hailed the announcement as a "major breakthrough" for minority business in the metropolitan New York area. "This represents the first Puerto Rican-sponsored and developed shopping center to be built in the continental United States," Armendaris said, "and it will offer an example of dynamic minority business talent at work in the best American tradition."

The new center—to be called the San Juan Plaza—will be located on Third Avenue, between 154th and 156th streets. This location is considered a prime retail area.

A study by Larry Smith and Co., an economic analysis firm, estimates that some $250 million in annual purchasing power exists in the San Juan Plaza trading area. This is expected to increase to $300 million by 1980.

Manuel A. Alvarado, executive director of the South Bronx Puerto Rican Development Corp., says his coalition feels "that the Puerto Rican population of the South Bronx contains a wealth of entrepreneurial energy and acumen. It is our intention that San Juan Plaza be the first of many projects launched by New York City's Puerto Rican community for financial gain and economic prosperity."

Report Cites Security Training As Important To Cutting Crime

Businessmen harassed by increasing losses from various forms of crime should make sure that security personnel are adequately trained. This admonition is included in a 52-page booklet entitled "The Cost of Crimes Against Business" recently published by the Department of Commerce.

The booklet confirms and elaborates upon the report on crimes against business carried in the *Commerce Today* issue of July 8. It estimates that the cost of "ordinary" crimes against business will rise to $20 billion in 1974 from $18.3 billion in 1973 and $15.7 in 1971.

With regard to the efforts of businessmen to protect themselves against crime, the booklet makes the following points:

The average large company is spending well into six figures on security, according to industry sources. Many employ either outside guard services or their own guard forces who patrol the buildings and man the entrances. In addition to guard service, many have installed alarm systems, closed-circuit TV, sound detectors, and other sensing devices.

Among the reasons most often cited for growth of private security efforts are increasing business losses due to crime, rising insurance rates and the expansion of categories for which property insurance cannot be obtained, and insurers requiring the use of private security systems or granting premium discounts when private security measures are taken.

The growth of numbers of personnel in private security has not been accompanied by training programs adequate for the field. Many security guards receive no training before being put to work, and some armed guards were given no firearms training at all.

Over half the guards in one survey never attended high school while only 18 percent completed high school. Unless better training is provided, a rising number of lawsuits associated with private security acts such as false arrests, bodily injury, and property damage can be expected.

Where it's at

A greater concentration of crime was shown in the larger central cities. In 1973, 6,412,766 known offenses were reported in 4,944 cities of 10,000 population and over with a total population of 122,605,000. Among the cities, 43 percent of the crimes occurred in 55 cities with a population of over 250,000. These cities had 34 percent of the city population. Suburban areas outside of the cities had 45 percent as much population as the cities and reported 31 percent as many crimes. Rural areas had nearly 17 percent as large a population as the cities and reported less than five percent as many crimes.

Crime-related losses have a depressing effect on business. In 1974, they are expected to amount to $137 for every adult in the country. They are equal to about 17 percent of total corporate profits, and must be passed on to consumers in the form of higher prices, or absorbed by businessmen with resultant lower profits.

Small business suffers an impact from crime that is 3.2 times the average, and 35 times that of businesses with receipts over $5 million. Retail establishments are hardest hit. Based on estimated sales of $117 billion in 1974, losses of department and apparel stores are expected to total $3.5 billion, a 44 percent increase over 1971. In 1973, crime losses of such stores reached about three percent of sales. According to the Law Enforcement Assistance Administration, while burglary and robbery were reported by 49.7 percent of all commercial establishments in four of the nation's largest cities in 1972, the rate for retail establishments was 71.4 percent.

Organized crime's role

The honest businessman suffers because organized crime results in increased insurance costs, inequitable tax burdens resulting from tax-dodging of racketeers, higher prices to compensate for crime losses, and investment of illicitly acquired funds in licit enterprises. Today organized crime controls a number of multi-million-dollar enterprises, according to a study of the Chamber of Commerce of the United States.

Drug and alcohol addiction can intensify crime problems in business. Studies indicate that a large proportion of thefts from business are committed by addicts to support their habit. Similarly, employees in debt to loan sharks or who have lost large sums of money gambling are under a great deal of pressure to steal.

Office security is a growing problem in both public and private buildings. It has been estimated that the number of incidents of office crime is doubling every three years. The actual number is impossible to determine, since many police reports do not list office theft separately and many instances are not reported to police at all.

Bad checks accounted for about 13 percent of crime-related losses to business in 1967-68, according to a study by the Small Business Administration. Such losses may be expected to increase as use of checks in place of cash grows.

Counterfeiting is on the upswing. While ultra-violet scanners and other counterfeit-detecting devices are available, they add to the cost of doing business, and none has been endorsed by the U.S. Secret Service, which is responsible for combating counterfeiting.

The government will not reimburse a businessman who accepts a counterfeit bill. He must therefore protect himself by learning to recognize the difference between real and bogus currency.

A closely related problem is forged government checks. Checks are looted from the mailboxes of the legitimate recipients and endorsements forged by thieves. Businessmen who cash such checks, or take them in payment for goods or services, will suffer the loss of the amount of the checks, since the government will not honor them. It is essential when cashing government or other checks that the endorser identify himself adequately.

Inventory shortages are the major factor in crime-related losses of retail stores, and are significant contributors to losses by wholesalers and manufacturers as well. Inventory shortages result from shoplifting and employee theft, as well as honest bookkeeping errors. Ticket switching by shoppers and deliberate underrings by cashiers also add to inventory shortages.

Stealing frequently occurs in receiving, shipping, delivery and mail order departments. It is practiced by some sales persons who underring registers and pocket the difference, or who undercharge their friends or accomplices. Executives may juggle books or pad payrolls, and buyers may demand kickbacks or expensive gifts from suppliers. It is impossible to compile a complete catalog of the schemes practiced by dishonest employees.

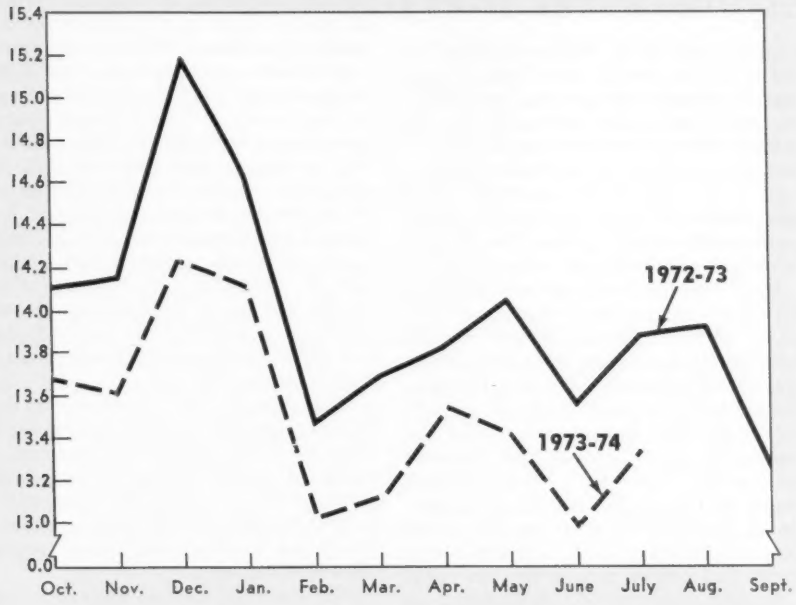
Most get away

About four million shoplifters are apprehended each year. It is estimated that only one out of every 35 is caught. This indicates that about 140 million instances of shoplifting occur every year. In a study conducted by a major security service firm, 500 shoppers were followed at random in a New York department store. Forty-two, or one of every twelve, were observed stealing some item during their visit to the store.

New techniques to combat inventory losses are constantly under development. One of the latest is an electronic merchandise tag, which can be removed only with a special tool. If not removed by the clerk, the tag triggers an alarm at the exit from the department or from the store. Many of the alarms triggered have caught innocent customers, however, when clerks fail to remove tags. Advanced techniques obviously call for advanced training.

"The Cost of Crimes Against Business" is available from U.S. Department of Commerce district offices or from the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402, at $1.10 per copy.

Industry's Energy Efficiency Improves



THIS DECLINE IS A HEALTHY SIGN—*Tracking industrial energy use over a ten-month period, Commerce's Office of Energy Programs found that energy consumption decreased 1.58 percent while industrial output increased 2.39 percent. Since less energy was used to produce more goods, OEP calculates that on a national basis U.S. industry improved its unit output per energy input ratio by some 4.13 percent. This ratio represents the percent improvement between an average monthly energy/output ratio of 14.10 for Oct. 1972-July 1973 and 13.51 for the same months a year later. The Energy Efficiency Ratio is an approximate measure of energy consumed per unit of output. It is calculated by dividing industry's total BTU usage by the Federal Reserve Board unadjusted monthly industrial production index.*

Ocean Investors Can Submit Views

U.S. firms with an interest in ocean investments in petroleum and minerals can have their views considered for inclusion on the agenda of a March meeting dealing with that problem.

The Working Group on International Ocean Investment Conditions—a part of Commerce's Marine Petroleum and Minerals Advisory Committee—recently held a public meeting at which the views of American businessmen and other affected citizens were solicited for consideration at a meeting of the committee.

Some areas of concern will be: honoring of contractual obligations, settlement of disputes, security of tenure, and the roles of the private sector and the Federal Government.

Interested persons are invited to submit relevant written statements. Such statements should be received before the end of the year in the office of the Executive Secretary, Marine Petroleum and Minerals Advisory Committee, National Oceanic and Atmospheric Administration (MR3), Rockville, Md. 20852.

The Marine Petroleum and Minerals Advisory Committee advises the Secretary of Commerce on matters concerning the Department's responsibilities related to marine petroleum and marine minerals resources, and on means to facilitate cooperation with the private sector.

Ode To An Erg

Shakespeare it's not, but some Holiday Inns in the Maryland-Pennsylvania-Ohio area are waxing poetic about energy conservation,and are passing on the following epic plea for energy sanity to their patrons:

Some old motel customs
Will soon become vices,
Like leaving lights on in
An energy crisis.

And opening windows,
And turning on heat,
And using the power
To warm up the street.

So try to save power
Wherever you roam
And create a reserve
To use when back home.

The energy flowed well
For ages and ages,
So much was around that
We opened the gauges.

And the gas we consumed
In our Continental
We always regarded
As quite incidental.

But we used up the oil,
We wasted the power,
And we squandered the gas
And **NOW** comes the dark hour.

Comes the cold and the dark!
Will it be a blown fuse?
Or the last of our watts
Or our last BTUs?

And I'll bet my money
That you'll be damn mad,
When *off* goes the heat in
Your own little pad.

But there's a fine, fine thing;
A fine thing you can do,
By commencing a trend
That will help me and you.

That very fine thing is
The saving of power
To change a bad scene
To a happier hour.

We certainly hope that
This trend will begin,
While you are a guest at
Our Holiday Inn.

We will give you a scroll
And here's how it reads,
"Our guest saved some power
For his personal needs."

We have asked all our maids
To join in the fight,
And when leaving the room
To turn off the light.

"I'll die in the poorhouse,"
Our Dad always would scream,
"Were you born in a barn?"
Was his next favorite theme.

But here's a new slogan
Not based on high prices,
"Turn off the lights, Mac!
There's an energy crisis!"

All of which shows that, no matter what your trade, you can get involved in the energy parade. We'll find, by turning our brains on full power, there's no need from an energy crisis to cower.

Stockowning Is Still The Province Of The Wealthy, Despite Some Shifts

The dream of every American having a piece of the action through stock ownership remains pretty much that—a dream—according to an article in the latest issue of Commerce's *Survey of Current Business.* And all stockholders—rich and poor alike—have taken it on the chin to the tune of about $300 billion in lost market value during the slump which began early in 1973.

The article—by Wharton School professors Marshall E. Blume, Jean Crockett, and Irwin Friend—provides new information on the amounts of stock owned by different groups of U.S. individuals and the rates of return and risk characteristics of their stock portfolios.

The article points out that the concentration of individuals' stockholdings among upper income groups in the United States declined markedly from the 1920s to 1969 but seems to have leveled off thereafter. In contrast, the concentration of total income among upper income groups, which had also declined substantially until the end of World War II, leveled off early in the postwar period.

The distribution of stock among different income classes remains quite concentrated, despite the fairly substantial movement toward a more egalitarian distribution of stock ownership. In 1971, the 1 percent of U.S. families (including single individuals) with the largest personal income accounted for 47 percent of dividend income received and 51 percent of the market value of stock owned by all families, and the 10 percent of families with the largest income accounted for 71 percent of dividend income and 74 percent of market value. These groups in 1960 owned 50 percent and 79 percent, respectively, of the market value of the families' shareholdings.

As of mid-1971, the amount of stock owned by individual U.S. residents was an estimated $780 billion, compared with $335 billion for mid-1960. The current value of individuals' stockholdings would probably be below $500 billion, the authors state, due to the drop in stock prices and continued net stock sales by individuals to institutions.

Of the $780 billion individual stockholdings in mid-1971, $460 was held in domestic New York Stock Exchange and other listed issues, $50 billion in mutual fund shares, $35 billion in unlisted bank and insurance shares, and $190 billion in direct holdings of other traded and privately held unlisted stock.

A high proportion of the portfolios held by individuals are dominated by a small number of issues. That goes for all income groups. The lack of effective diversification suggests that many stock portfolios are riskier than they need be. A high proportion of investors will do much worse than the market in a major market decline. The authors surmise that millions of investors—including many with moderate means—must have experienced catastrophic losses since early 1973, during which time the market value of NYSE stock has dropped more than one-third from its high point.

Small investors have not been switching out of stocks any faster than large individual investors during the past decade; both groups have been selling significant proportions of their stockholdings to institutional investors since the 1950s.

Individuals in managerial positions and the retired are the groups with the most stockowners. The relative share of stock owned by families headed by retired persons is appreciably higher than in earlier years. Managers tend to hold the riskier stocks, and retired persons the less risky.

Managerial control of U.S. corporations may have been enhanced as an extremely large number of new, and generally rather small, stockholders have acquired shares through the reduction in holdings of a comparatively small number of much more substantial individual investors. Also, many individual holdings of all sizes have been replaced by a small number of very large institutional holdings. Institutions have not played an active role in corporate affairs, and small individual investors have tended to be less active than large ones.

The lower income groups tend to hold somewhat less risky stocks than the upper income groups. While the upper income groups own substantially more stocks on the average, a high proportion of their portfolios are as poorly diversified as those of the lower income groups. Mutual funds were a much more, and NYSE stock a somewhat more, important part of lower income portfolios. Among the NYSE stocks, the lower income groups were relatively more likely to hold telephone and electric and gas utility stock than the higher income classes.

The average rates of return on stock held by the lower income groups did not seem to differ significantly from the returns on stock held by upper income groups. Similarly, there did not appear to be any noteworthy differences in rates of return for investors of different occupations and regions.

The *Survey of Current Business* is available from Commerce District Offices or from the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402, at an annual subscription price of $48.30, including weekly supplements; single copy $3.

Small Sea Slicks Seen Saving Survivors By Smoothing Surface

A harmless man-made sea slick that is being studied as a hurricane suppressor may also help save lives in another way, according to a scientist with Commerce's National Oceanic and Atmospheric Administration.

Duncan Ross of NOAA's Atlantic Oceanographic and Meteorological Laboratories in Miami believes that a slick-forming chemical, added to the dye packets of life jackets and rafts, would make it easier for rescuers to spot persons cast adrift at sea.

Certain chemicals form temporary sea slicks on the surface of the ocean, covering the water with a thin, polymer membrane only a few molecules thick. A small amount of one such compound can produce an acre of slick in 20 minutes, with a clearly visible, stable boundary. The chemicals have low toxicity for humans, and the amounts involved would be too small to harm aquatic life.

Last year, two scientists with NOAA's National Hurricance Research Laboratory and the Illinois Institute of Technology announced that such a slick could block one of the channels feeding hurricanes, which draw their destructive force from evaporation-produced heat energy from the ocean's surface. The scientists concluded that the chemical film could effectively suppress evaporation and waves, and, therefore, inhibit the development of storms.

The man-made slicks, which produce a smoother-looking patch of water, even suppress the ripples on a ship's bow wave.

This wave-suppressing property, says Ross, makes the polymer sea slick a potential lifesaver. Many lifejackets and rafts carry dye packets used in an emergency to create a splotch of bright orange in the water. The dye patch, however, is soon dissipated by waves.

The ability of sea slicks to calm the seas, Ross says, would prolong the life of the dye patch. Two ounces of oleal alcohol, added to lifejacket dye packets, could form a slick about 200 feet in diameter that lasts several hours.

The slick is highly visible and can be detected by airborne radar, so an all-weather search could be conducted from high altitudes during periods of low visibility.

College Students Getting Older; Greater Percentage Are Women

The Old School Tie is being worn by older students nowadays, and more of them are women. Also, fewer of the ties carry private school colors.

Commerce's Census Bureau reports that the proportion of college students in the 25-to-34-year-old age bracket has risen from 18 percent of the total in 1947 to 22 percent in the fall of 1973. During the period, total college enrollment increased from 2.3 million to 8.1 million.

The Bureau also found that a dwindling percentage of 18 and 19-year-olds has been entering college since 1971.

The shift to older college students has been more pronounced for women than for men. In 1947, only 5 percent of an estimated 624,000 women college students were in the 25-to-34-year bracket; in 1973, 18 percent of 3.5 million women students were in the older group. Comparable percentages for men were 23 percent in 1947 and 26 percent in 1973—not a statistically significant difference.

The report showed also that very young women college students (those under 18 years) declined sharply during 1947-73—from 16 percent of all women college students to 5 percent by 1973.

The ratio of men to women in college declined noticeably, from 270 men to every 100 women in 1947 to 133 men to every 100 women.

Private enrollment

Enrollment in private colleges is proportionally much smaller than it was two decades ago: about 40 percent of all college students were in private institutions in 1954, compared with only 24 percent in 1973.

Private college enrollment is closely tied to family income and residence in metropolitan areas, according to the report, "Social and Economic Characteristics of Students: October 1973." In 1973, 29 percent of college students 18 to 24 years belonging to families with at least $15,000 a year income were in private institutions; only 16 percent of those in families with a yearly income under $5,000 attended private colleges. Also, 26 percent of college students living within metropolitan areas were attending private colleges compared to only 16 percent of those living in non-metropolitan areas.

Guaranteed Synthetic Fuel Price?

A government-guaranteed price system has been proposed as a possible means of assuring the rapid and orderly development of synthetic fuel production in this country, ending U.S. dependence on foreign fuel sources and the danger of being "bled to death economically."

Speaking before the Sixth National Forum of the Transportation Data Coordinating Committee in Washington, Under Secretary Tabor said that this country has proven reserves of coal and shale sufficient to supply its anticipated requirements of oil and gas for more than 400 years.

The means of relative self-sufficiency from proved resources "are in our hands, available in the form of coal which needs to be gasified or converted to oil. It is also available, though subject to serious ecological problems, in the form of shale."

But he noted that private enterprise is loath to invest the millions required to perfect the processes and plants to convert coal to oil and gas so long as foreign oil producers are capable of reducing world prices on oil from $11 back to $3 or $4 as easily as they increased them from $3 to $11.

"One proposal under consideration is that the United States Government guarantee a price for fixed amounts of oil or gas produced from coal or shale over long-term contracts," he said. "The price which would be guaranteed would not be set by the government but by private companies bidding against each other for government-guaranteed contracts for specific quantities of synthetic fuels over specific time periods. The government would seek bids, over a period of years for increasing quantities of production.

"Any responsible bidder could submit a bid. His price would be based on his estimated costs and an awareness that able competitors were submitting sealed bids against him," he explained.

"Production would remain in the hands of the private sector. No massive government bureaucracy would be established. No Manhattan-type project would be undertaken. Rather, the creative forces of free enterprise would be harnessed, under the umbrella of a government guarantee, steadily to increase our domestic supply of oil and gas, to end our dependence upon foreign sources and to substantially reduce the export of our needed dollars for foreign source petroleum.

"By limiting the government guarantee to the production of synthetic oil and gas we would be using the government guarantee where needed, but we would avoid the inflationary consequences of protecting raw crude production, which is proceeding well at present and anticipated market prices," Tabor concluded.

Set-Aside Raised On Accumulation Of Ferrous Scrap

Secretary of Commerce Frederick B. Dent has announced that the hardship set-aside for ferrous scrap exports in the fourth quarter has been increased by 61,000 short tons, from 50,000 tons to 111,000 tons. The Secretary emphasized that this increase does not increase the fourth quarter quota, which remains at 2.1 million tons.

Commerce recently received indications from ferrous scrap exporters of hardships resulting from accumulations of scrap at processing yards in various parts of the country. A recently concluded Commerce survey of ferrous scrap processors, exporters and users (steel mills and foundries) confirms the scrap industry's claims of some scrap accumulations and difficulties in disposing of scrap.

The 61,000 tons added to the hardship set-aside were obtained by transferring 33,000 tons from the 50,000 ton Maritime Administration set-aside which will not be needed for the sale of ships to be scrapped abroad, and 28,000 tons of the 480,000 ton non-historic country quotas for which license applications were not submitted.

Secretary Dent explained that whatever portions of the fourth quarter historic country quotas totaling 1.42 million tons remain unused by Dec. 13 will also be transferred to the hardship set-aside. Shortfalls in license applications against these historic quotas, if any, could not be ascertained until mid-December, the deadline for filing of license applications by the historic exporters.

Export licenses issued against the hardship set-aside will be valid for 90 days. The closing date for filing hardship applications will be Dec. 31.

The hardship criteria set forth in the recent amendment to the Export Administration Act will be applicable in considering applications.

Export Administration Bulletin No. 130 sets out those criteria, which were incorporated in Commerce Department regulations on Sept. 25.

Recent Technical Publications

These recent reports of government-conducted or government-sponsored research of possible interest to U.S. businessmen are available from the National Technical Information Service. Prices listed are for paper copies; second prices, where listed, are for microfiche. All others are available in microfiche for $2.25. Order from NTIS, Springfield, Va. 22161 (703-321-8543).

A review of factors influencing railroad electrification (PB-223 995/cz). Federal Railroad Admin., Washington. Feb. 45 pp. $3.75. Examines the possible role for greatly expanded rail electrification in the United States within the context of increasing freight traffic, current railroad operations, capital requirements, research and development needs, energy availability, natural resources and the environment. Advantages and disadvantages of both conventional diesel-electric and straight electric locomotives are fully described. Three recommendations are made concerning planning, cooperative research and development, and legislative programs to help implement rail electrification.

Planning for the bicycle as a form of transportation (PB-234 664/cz). Pan-Technology Consulting Corp., Washington, D.C. July 131 pp. $5.75. A bikeway systems planning manual for assisting public officials and bicycle enthusiast groups in designing and implementing safe and economic bikeways in their community. Detailed guidelines for policy planning, functional planning and implementation are included. The manual is structured to provide users with a systematic and practical approach in planning and constructing a bikeway system.

Chemistry and technology of oil and fuel additives (AD-782 849/cz). Foreign Technology Div., Wright-Patterson AFB. May. 392 pp. $10.25. Considers problems in the synthesis of organic compounds that are useful as additives to lubricating oils and reports the results of research to determine the mechanism of their action. Considerable space is devoted to the technology and application of additives to various types of oils. Research on the synthesis and use of fuel additives is only summarized. The book is intended for scientific workers and engineers active in the synthesis, production engineering, and application of oil and fuel additives and for specialists in the petroleum-refining and petrochemical industries.

Reinforced thermoplastics (AD-872- 760/cz). Babcock and Wilcox's Lynchburg, Va. Research Center. April. 29 pp. $3.75. Contains the results of a research program to identify the properties of a series of continuous unidirectional fiber reinforced thermoplastic matrices. Graphite fibers with a modulus of 30 million p.s.i. and 60 million p.s.i. and Kevlar 49 fibers were employed, and the matrices were nylon, polycarbonate, noryl, polysulfone, and polyphenylquinoxaline.

Mechanics of composite materials (AD-782 783/cz.) U. of South Florida, Tampa. 1974. 9 pp. $3.25. The purpose of this research was to determine the fracture characteristics of particulate (filler) composite materials consisting of an epoxy matrix and either glass or metal fillers. The modes of initial failure and subsequent fracture we reconsidered for establishing criteria dependent on filler to matrix volume ratio and finite length filler geometry.

Tire recycling and reuse incentives (PB-234 602/cz). International Research and Technology Corp., Washington. 116 pp. $5.25. Describes a series of strategies to deal with the disposal/recovery of scrap tires. They constitute a particularly intractable form of solid waste since they do not decompose, have an adverse effect on incinerators and air emissions, and disrupt the compaction process in sanitary refills. The options for the disposal or recovery of used tires are described by this study as well as research into new methods of tire recovery. A series of strategies was devised under which various economic, regulatory, educational, and research and development activities were combined to provide incentives to encourage the reuse of tires or improve tire disposal practices.

Human resource accounting (replacement cost) and its cognotive impact on management decisions (AD-782 313/cz). Naval Postgraduate School, Monterey, Cal. June. 90 pp. $4.75. The purpose of this thesis was to develop a human resource replacement cost model that could be adapted to the Navy system. The Delphi technique was used to test the model and to elicit the opinion of a group of Naval managers concerning human resource management and replacement costs. It was found that there was limited personal knowledge about actual personnel replacement costs.

How clean is our city? (PB-234 367/cz). Urban Institute, Washington, D.C. 1972. 76 pp. $4.75. (microfiche $4.75). The Urban Institute developed and tested a system for measuring the effectiveness of solid waste collection and street and alley cleaning operations. Practical aspects are emphasized—ways to establish a measurement system, the training of inspectors, the inspection operations, analysis of citizen complaints, survey techniques, use of the findings by local officials to improve their operations, and approximate costs.

Reducing the need for travel (PB-234-665/cz). Interplan Corp., Santa Barbara, Cal. March. 165 pp. $6.25. The reasons for travel are analyzed. Possible solutions to reducing travel are grouped into three classifications: communications substitutes; changes in the location and structure of cities; and rescheduling of work hours. A fourth alternative, that of reshaping the need for travel through increases in the cost of travel by auto and reeducation of the public plays a major role in the proposed Urban Mass Transportation Administration program.

Calendar For Businessmen

Dec. 28-30—San Francisco—American Economics Assn. annual meeting, San Francisco Hilton. For information, AEA, Nashville, Tenn. (615-322-2595).

Jan. 5-8—Cambridge, Mass.—16th Annual "Live-In" Seminar, Harvard Business School. Sponsor: Smaller Business Assn. of New England, Inc. For information, SBANE, 68 Hickory Drive, Waltham, Mass. 02154. (617-890-9070).

Jan. 12-17—Tucson—Basic Industrial Development Course, Univ. of Arizona. For information, Kent Alexander, College of Business and Public Administration, Univ. of Arizona, Tucson. (602-884-1252).

Jan. 13-17—Chicago—National Housewares Exposition, McCormick Place. Contact National Housewares Manufacturers Assn., 1130 Merchandise Mart, Chicago, 60654. (312-644-6363.)

Jan. 14-18—Atlanta—4th Southeastern Tool & Manufacturing Exposition and Engineering Conference, Atlanta Convention Hall. Sponsor: Society of Manufacturing Engineers. For information, SME, 20501 Ford Road, Dearborn, Mich. 48128. (313-271-1500).

Jan. 15-16—Austin, Tex.—Water Management by the Electric Power Industry, Eighth Water Resources Symposia Series, Univ. of Texas. For information, College of Engineering; Univ. of Texas, Austin. (512-471-3506).

Jan. 16—New York—Financial and Economic Outlook for 1975, McGraw Hill Bldg. Sponsors: Kent Econometric Assoc., and Comshare, Inc. For information, Comshare, Inc., 900 Wolverine Tower, Ann Arbor, Mich. 48106. (313-994-4800).

Germans Keep Cars Longer, Add More Auto Maintenance Equipment, U.S. Firms Learn

Although sales of new cars are down in West Germany, the increasing demand for replacement parts, tools, and equipment is expected to continue. This is the appraisal of exhibitors in the U.S. pavilion at Frankfurt's AUTOMECHANIKA '74, one of Europe's leading automotive service fairs.

Contributing to the increasing demand—10 to 20 percent annually—are the gains in auto registrations, although at a slower rate, and the fact that people are keeping their cars longer and appear to be willing to spend money for maintenance.

Anticipating a growing market for their services, garages, service stations, and engine rebuilders have expanded their purchases of replacement parts, engine tuning and diganostic equipment, repair and engine rebuilding equipment, and bodywork tools. Many service stations and workshops are purchasing small functional tools as they do not have sufficient capital to invest in larger, more sophisticated equipment attractive to original equipment makers and large service operations. Many American hand tools for special tasks are not readily available in Europe and thus have excellent sales prospects. These specialty and pneumatic tools are produced on a large scale in the United States and are lower priced than comparable products of local manufacture.

Several U.S. firms selling do-it-yourself equipment predict that the rapidly increasing charges for automobile repairs and maintenance will encourage more automobile owners to purchase their products; thus, their sales should continue to grow 10 to 15 percent annually.

Equipment and processes which were rated by the exhibitors as being the best sales prospects included automobile diagnostic and tune-up equipment, truck frame straighteners, die grinders, exhaust pipe benders, jacknife control system, paint and mixing equipment, ignition parts, alternators, hose clamps, auto wash and wax concentrate, rustproofing.

The German market is highly competitive and factors that give Americans a competitive edge are more advanced technology and design, price, versatility, operating efficiency, and parts availability. For market acceptance, parts, tools, and equipment should conform to European technical and legal requirements. Engine tune-up, diagnostic, and repair equipment should have metric measurement. Electrical equipment should operate on 50-cycle, 220-volt, single-phase current, or 220 2-phase or 380 3-phase for heavy machines.

The exhibitors indicated that the principal end-users of their products are, in order of importance: garages, repair shops, automotive or do-it-yourself shops, manufacturers, licensees, trucking firms, department stores, mail order and direct mail, government agencies.

Summarizing the experiences of most U.S. exhibitors, the president of one firm commented, "This trade fair has been helpful in enabling me to study first hand the market potential for our product in the European Economic Community. In the short period of five days I've visited with a score or more possible customers who have expressed interest in selling our products. . . . We've learned much of the market-pricing customs and distribution patterns. I am most satisfied with our decision to participate and would recommend to other small factories interested in the European market that they take part in future such events."

As reported in the Nov. 11 issue of *Commerce Today*, page 23, the 34 U.S. exhibitors, representing 80 firms, project their resulting sales in the next 12 months at some $22.4 million, of which $16.6 million is estimated by new-to-market firms.

DOWN THE AISLE AT AUTOMECHANIKA—*Trade visitors kept the U.S. exhibitors busy describing their products during the recent automotive service fair in Frankfurt.*

'Years-Ahead' Audio-Visual Products For Schools Draw Scandinavian Buyers

"Light years ahead of what is used in Scandinavian schools" was a common reaction during the recent display of U.S. educational and communications equipment at the U.S. Trade Center in Stockholm.

Although Scandinavia—Sweden especially—prides itself on having an advanced educational system, it is agreed that the United States is the pacesetter and innovator in school-related equipment. Exceptional interest in these products was expressed by visitors from throughout Scandinavia.

Favorably received products at the U.S. show included: video tape record and playback systems; video tape softwear; blank video tape; blank audio tape, casette and reel-to-reel; audio casette duplicators; audio recorders and synchronizers; projectors; print and transparency makers; and projection screens.

Additional interest

Other U.S. articles that drew favorable attention were: microfilms; filmstrips; educational films; card readers; breadboard systems; lettering systems; software for instruction of the deaf; student response systems; media control systems; offset duplicators; flight simulators; driving simulators; musical training laboratory (piano); softwear for industrial and vocational instruction; and pocket calculators.

The exhibition revealed a few minor obstacles for softwear sales in the educational field. In most cases, translation of material and official certification are required before any large scale orders can be booked. For example, all material used in Swedish public schools must first be approved by the Ministry of Education in Stockholm. These obstacles are far from insurmountable, however, and all of the 28 U.S. exhibitors were optimistic for future sales.

COMMUNICATING IN STOCKHOLM—*Display of E & L Instruments, Derby, Conn., new to Swedish market, generated much attention at recent U.S. Trade Center Show.*

U.S. Exhibition Results In Brief

The following summary reports have been received on U.S. overseas commercial exhibitions. Further details and marketing data derived from these exhibitions will be published as available.

Minicomputers and Peripheral Exhibition. U.S. Trade Center, Frankfurt, West Germany, Dec. 3-6. Exhibitors 50, representing 70 companies. Floor sales $1,482,755; 12-month projection, almost $75 million of which $4.5 million was accounted for by new-to-export and new-to-market firms. Representation agreements concluded, 5; under negotiation, 67.

Automated Business Equipment Exhibition. U.S. Trade Center, Taipei, Nov. 19-22. Exhibitors, 23. Floor sales, $252,000; 12-month projection, $3.1 million, with firms new-to-export or -market estimating $480,000. Agreements signed, 3; under negotiation, 10.

ELECTRONICA '74. Munich, Nov. 21-27. Exhibitors, 58, representing 78 U.S. firms. Floor sales, $3 million; 12-month projection, $37.6 million, of which $8 million is forecast by new-to-export and -market firms. Representatives appointed, 28; agreements under negotiation, 66.

BUSINESS EQUIPMENT DRAWS CROWDS—*At U.S. Regional Trade Center, Singapore, electronic data processing exhibition attracted a broad range of visitors.*

EDP Exhibition, Singapore, Finds Prospects Best In Minicomputers

U.S. exporters of electronic data processing equipment looking to markets in Southeast Asia are finding minicomputers and business machines the lines with the greatest current appeal.

This emerges from a report on a recent EDP and Related Business Equipment and Systems Exhibition at the U.S. Regional Trade Center in Singapore. In the report, the U.S. Embassy emphasized growing use of electronic data processing equipment in Singapore's commercial life:

"The Government's development policies are directed at making Singapore the 'brain center of Southeast Asia,' and it appears that the financial sector and the data processing service sector will benefit most from these policies."

The largest potential customers for EDP equipment are government agencies, financial institutions and service companies—with a few large manufacturers,

university research centers and construction and building management firms providing a significant number of potential customers.

The growth in demand for EDP equipment is attributed to the increasingly sophisticated operations of financial institutions, government agencies and trading companies in Singapore and the increase in operating costs, particularly wages, which has made labor saving equipment and waste reducing processes essential to Singapore-based firms.

Focus on minicomputers

Analysis of the results of the Trade Center exhibition indicates that the market for minicomputers ($40-80,000 range) is especially attractive to U.S. manufacturers at this time. To date, one or two large American firms have dominated the EDP market in Singapore with some competition from a British firm. This situation is rapidly changing with the advent of the minicomputer which has lowered the costs and special space requirements for firms desiring to computerize their operations.

Visitors responded favorably to all of the equipment exhibited, with special interest centering on the smaller, less expensive products. Those with the best sales potential are minicomputers, reader-printers, key punchers, key-to-disk and key-to-tape data entry systems, desk top calculators, cathode ray tube and typewriter terminals, microfilmers and software products.

Service facilities essential

The Embassy's report emphasized the need for firms interested in selling in Singapore to make the substantial investment required to establish a service facility. Price and product design are important, but after-sales servicing capability is an essential part of a successful marketing program. Assuming no serious economic downturn, EDP sales are estimated to double in the next two years, with most of the increase in the smaller pieces of equipment and accessories.

U.S. Exhibitors Welcome At Grenoble Sports Show

American manufacturers of winter sports equipment, accessories and clothing may wish to participate in Grenoble's 18th Winter Sports Show to be held March 1-4, 1975. Exhibitors at this year's show numbered 510, of which 146 were foreign companies. Almost 12,000 visitors registered, about 2000 of whom were from abroad.

Write: Michel Gillet, General Manager, Salon / Professional International des Articles et de la Mode des Sports D'Hiver de Grenoble, Alpexpo, Avenue d'Innsbruck, 38029 Grenoble, Cedex, France.

MACHINE TOOLS IN MEXICO—*William Truska (with square badge), sales representative for the Lockformer Co., Lisle, Ill., points out advantages of his equipment to visitors.*

Machine Tool Market In Mexico Growing, But Competition Is Strong

A ready market for machine tools exists in rapidly industrializing Mexico but it is not snugly in the hands of U.S. exporters. Strong competition from West Germany, the United Kingdom, Italy, and even Eastern Europe requires American manufacturers actively to remind Mexico's industrialists of the advantages of U.S. products: quick maintenance, high quality and competitive prices.

This was the conclusion of the exhibitors at a recent machine tools exhibition at the Mexico City U.S. Trade Center, where 33 companies achieved $430,000 in immediate sales and produced a forecast of $4.6 million in additional sales over the next 12 months.

The United States currently holds a 50 percent share of Mexico's $75 million import market for machine tools. The broad range of needs in the Mexican market was reflected by the broad selection of products displayed. Equipment that attracted especially high interest among the 1,599 registered visitors included buffing and polishing machines, drill and tap grinding machines, a multipurpose iron-working machine, abrasive cut off saws, portable and tapping drills, and numerical control machining center.

Two U.S. exhibitors combined their presses and dies to present a lively demonstration of the qualities of their products. Both reported some 50 solid sales leads that would be followed up after the show. Another company noted 250 sales leads registered during the five-day activity.

The need for greater productivity is being driven home to the Mexican industrialist by rising costs for labor and raw materials. This demand generated interest in more efficient production machinery and in "labor saving" safety equipment on display.

The Mexican Government's program of import substitution, implemented by tax incentives, exemptions from import duties on capital equipment investments, and import - protection - through - licensing system, is a two-edged sword for U.S. exporters of machine tools. As Mexican production of equipment increases, more and more U.S. manufacturers find that a portion (and, in some cases, all) of their lines will not receive the necessary import licenses. Items suffering from restrictions currently include power hack saws, power drills, certain sizes of presses and lathes, grinding machines and simple bench vises. The more sophisticated and specialized equipment, however, is being imported in increased numbers to meet the growing demands of the metal fabricating industry which is thriving under the Government's protective policies.

Ophthalmic Goods Display

U.S. firms are invited to display ophthalmic goods at an exhibition in Linz, Austria, next Oct. 9-12, during a biennial Austrian and Swiss meeting of opticians. **Write:** Offerta Werbe und Ausstellungs GmbH (Oesterreichisches Bauzentrum), Fuerstengasse 1, A-1090 Vienna.

Washington's

Official Trade Briefs

This article is another in a series of reports that describe actions affecting world trade, as compiled by the Legislative and Tariff Policy Division of the International Economic Policy and Research Staff's Office of International Trade Policy.

THE PRESIDENT

Executive Orders: President Ford on Nov. 16 issued an executive order imposing temporary quantitative limitations on importation into the United States of certain cattle, beef, veal, swine, and pork from Canada. The quotas—retroactive to Aug. 12, the date the Canadians imposed quotas on imports of beef, veal, and live cattle for slaughter—were established as a direct response to the Canadian restrictions on U.S. meat products. Discussions are being held between the United States and Canada in an effort to work out disagreements and problems regarding bilateral trade in beef. The Canadian Prime Minister and the President discussed possible solutions in Washington recently.

On Nov. 18, the President issued an executive order which will maintain duties on sugar imports at the lowest possible rate under the Tariff Schedules of the United States (TSUS). The Sugar Act was scheduled to expire Dec. 31, and in the absence of specific Presidential action to continue the present duty the duty would have increased from .66 to 1.99 cents per pound. As required by law, the President set a global quota of 7 million short tons on imports of sugar for 1975. In 1974 the total quota, allocated on a country rather than a global basis, amounted to 6.7 million short tons. The President noted that the 1975 quota should be adequate to meet anticipated import requirements and ensure a degree of stability in the domestic sugar industry in a period of tight supply.

Veto: The President vetoed H.R. 6191, which would have amended the TSUS to provide that certain forms of zinc be admitted free of duty. The President stated that he had no objection to the duty-free importation of zinc but that he found unacceptable an unrelated amendment attached to the bill that would have provided compensation to persons who sustained property losses as a result of several natural disasters in 1972. The House of Representatives subsequently sustained the President's veto (see below).

THE CONGRESS

Changes in Organization and Membership of 94th Congress: Changes in organization and membership of the 94th Congress, which commences in January, can have a significant trade policy impact. Reorganization of the House will result in major shifts in committee responsibilities.

Foreign Affairs will now be responsible for international commodity agreements and export controls, some international trade matters, foreign aspects of P.L. 480, and authority over the Council on International Economic Policy (CIEP); Banking and Currency, for international monetary and financial organizations, legislatively—though Foreign Affairs retains oversight responsibility.

The Ways and Means Committee, which controls initiation of all legislation in the House dealing with international trade, will be expanded from 25 to 37 members. Since the House has approved a new rule requiring all committees with more than 15 members to establish at least four subcommittees, Ways and Means will be subject to this requirement.

Pending Legislation: H.R. 15977, the Export-Import Bank bill, was rejected in a first and a second compromise version by the Senate and was returned to a House-Senate Conference Committee.

H.R. 6191, providing for suspension of duties on certain forms of zinc, was vetoed by the President (see above), but attempts by the House to override the veto failed. The bill was referred back to Ways and Means for possible further revision.

Committee Hearings—Senate: The Committee on Interior and Insular Affairs began hearings on the Agreement on an International Energy Program recently signed by the United States and 15 major oil-consuming nations.

The Subcommittee on Merchant Marine of the Committee on Commerce concluded hearings on S. 2576, providing for minimum ocean rates by nonnational or third-flag common carriers by water operating in U.S. foreign commerce.

The Joint Economic Committee began hearings on proposals for financing oil imports. Those testifying included William Simon, Secretary of the Treasury, and Arthur F. Burns, Chairman, Board of Governors of the Federal Reserve System.

Information On Trade

A World Trade Information Center that features a computerized inquiry service is now in operation at the World Trade Center complex in New York City.

The center, located in the lobby of One World Trade Center, is linked to extensive research facilities on the building's 86th floor and to a computer in Cleveland. The computerized system, called Interfile, also serves world trade centers in London, Tokyo and Indianapolis, with others expected to join.

The Interfile coding system classifies questions by country, commodity and function of world trade. It identifies 200 countries and trade regions, 1,312 commodities in the UN Standard International Trade Classifications, and 250 functions in world trade.

The World Trade Center, built by the Port Authority of New York and New Jersey, now has about 500 firms and organizations from 50 countries as tenants in its twin 110-story tower buildings, a nine-story Northeast Plaza building and the U.S. Customhouse.

Trade Bill Progress

Congressional action on H.R. 10710, the Trade Reform Act, was being completed as this issue of *Commerce Today* went to press. A comprehensive and detailed report on this legislation is being prepared for a forthcoming issue.

The bill was reported out of the Senate Committee on Finance Nov. 26. The way was cleared for Senate floor consideration by the Dec. 3 testimony of the Secretary of State before the Committee — dealing with remaining concerns by certain members on the understanding with the Soviets on freedom of emigration. On Dec. 13, the Senate passed the bill by a vote of 77-4—following acceptance of some 30 amendments including the Jackson amendment, which would authorize the President to waive the freedom of emigation requirement of Title IV of the bill for Communist countries not currently receiving Most-Favored-Nation status. Congress was expected to approve the report of the House-Senate conference on the bill before adjourning.

Bills Passed: By a vote of 46-45, the Senate passed, with numerous amendments, S. 3394, foreign aid authorization for fiscal year 1975. The bill passed the House by a vote of 201 to 190 and was assigned to Conference.

By a vote of 44-40, the Senate passed the compromise version of H.R. 8193, the Energy Transportation Security Act (oil cargo preference), clearing the measure for the President. It requires that 30 percent of oil imports be carried in U.S. tankers.

Bill Reported: The Senate Committee on Armed Services ordered favorably reported S. 1988, to extend on an interim basis the jurisdiction of the United States over certain ocean areas and fish to protect the domestic fishing industry.

New Legislation: Since the opening of the 93rd Congress, 696 trade and related bills have been introduced. Proposed legis-

lation not previously reported in this column includes: H.R. 17470, to establish an Agricultural Products Export Control Board to allocate exports of agricultural commodities to assure that domestic needs for such commodities are satisfied at reasonable price levels; H.R. 17488, to provide a windfall profits tax on oil, to phase out percentage depletion on oil and natural gas, to increase the low-income allowance, to make changes in the treatment of foreign income, and to make certain other adjustments in the tax laws; H.R. 17544, to provide for federal regulation of foreign banks establishing, acquiring, operating, or controlling banks, branches, and agencies in the United States, and for other purposes (an identical bill, S. 4205, was introduced in the Senate); H.R. 17545, to prohibit manufacture or importation of Freon and similar substances unless a study finds such substances are not harmful to human life, agriculture, or the national environment.

TARIFF COMMISSION

Adjustment Assistance—Workers: The Commission reported to the President that the following groups of workers and former workers meet the requirements of the Trade Expansion Act of 1962 (TEA) and are eligible to apply to the Department of Labor for adjustment assistance: former workers of the Dover, N.H., plant of Weiss-Lawrence, Inc. **(footwear for women, misses, and children);** workers and former workers of the Electro Motive Corp., Florence, S.C., a wholly-owned subsidiary of International Electronics Corp., Melville, N.Y. **(film and mica capacitors);** workers and former workers of the Harrison, N.J. plant of RCA, New York **(electronic receiving tubes, mounts).**

The Commission reported to the President that the following groups of workers are ineligible to apply for adjustment assistance: former workers of the Tifton, Ga., plant of Blue Ridge Shoe Co., Wilkesboro, N.C., a wholly-owned subsidiary of Melville Shoe Corp., Harrison, N.Y. **(footwear);** former workers of Cara Mia Shoe Corp. and its wholly-owned subsidiary, Bobi Wood Heel Corp., Hialeah, Fla. **(footwear for women, misses, and children, and wood heels for footwear);** workers and former workers of the Gettysburg, Dillsburg, and East Berlin, Pa., plants of Gettysburg Shoe Co., Gettysburg, Pa., a wholly-owned subsidiary of Dero Industries, Inc. New York **(footwear for women and misses);** workers and former workers of Bowmar/ALI, Inc., Acton, Mass., a wholly-owned subsidiary of Bowmar Instrument Corp., Fort Wayne, Ind., **(electronic calculators).**

Investigations—Workers: On the basis of petitions filed under provisions of the TEA, the Commission has opened the following new investigations on the effects of imports on behalf of workers and former workers of: the Milford, Mass., plant of the Shaer Shoe Corp., Manchester, N.H. **(footwear for women);** El Rey of Hollywood, Inc., Los Angeles, Calif. **(footwear for women);** Baxter Woolen Co., Inc. and Strafford Processing Co., both of Rochester, N.H. **(woven fabrics, including laminated fabrics of wool).**

Investigations—Firms: The Commission has opened a new investigation on the effects of imports on behalf of Joseph Weiss & Sons, Inc., Brooklyn, N.Y. **(manufactured granite).** The Commission also opened an investigation on behalf of Haddad Shoe Corp., Lancaster, Pa. **(footwear),** but canceled it at the firm's request.

Section 337 (Unfair Import Competition) cases: The Commission recently initiated a preliminary inquiry based on a complaint by Audio Warehouse Sales, Inc., and Douglas T.V. Hi-Fi Stereo Center Corp., both of Washington, D.C., and Plaza Audio-Video, Inc., Hyattsville, Md., alleging unfair methods of competition and unfair acts in the importation and sale of **certain high fidelity audio and related equipment.** The complaint names U.S. Pioneer Electronics Corp., Moonachie, N.J., and Pioneer Electronic Corp., Tokyo, as engaging in the unfair acts.

The Commission recently instituted investigations on the basis of Section 337 complaints on the following products: **chain door locks,** complaint by Ideal Security Hardware Corp., St. Paul (case 337-39); **electronic flash devices,** complaint by Honeywell, Inc., Minneapolis (case 337-40). The Commission ordered termination of the above case with respect to Ponder & Best, Inc., Santa Monica, Calif., one of the named importers and distributors.

On the basis of submissions made to the Commission by interested parties and for other reasons, the Commission dismissed investigation number 337-35, **certain hydraulic tappets.**

Dumping Cases: The Commission, on receiving amended advice from the Treasury Department on a finding of sales at less-than-fair value (LTFV) announced termination of the investigation dealing with **tapered roller bearings** from Japan, initiating in its place a new investigation on **tapered roller bearings and certain components thereof** (see below).

OTHER AGENCIES

Treasury—Dumping Cases: The Department issued a clarification of a previous determination that **tapered roller bearings** from Japan are being, or are likely to be, sold at LTFV within the meaning of the Antidumping Act of 1921, as amended. The Department stated that the term "tapered roller bearings" was meant to include and continues to include tapered roller bearings, including inner race or cone assemblies and outer races or cups, sold as a unit or separately.

The Assistant Secretary of the Treasury announced a tentative determination to modify a dumping finding on **pig iron** from Canada to exclude pig iron produced and sold by Quebec Iron & Titanium Corp. from the finding.

The Department announced initiation of an antidumping investigation on **vinyl clad fence fabric** from Canada.

Labor—Adjustment Assistance: The following groups of workers have been certified by the Labor Department as eligible to apply for trade adjustment assistance: 180 employees of Louis Shoe Co., Amesbury, Mass. **(women's footwear);** 1,000 employees of Williams Manufacturing Co., Portsmouth, Ohio **(women's footwear);** 100 employees of the John Swenson Granite Co., Concord, N.H. **(granite);** 480 employees of the Tell City, Ind., General Electric plant **(electronic components).**

The following groups of workers were ruled ineligible to apply for trade adjustment assistance: 300 former workers at the Okmulgee, Okla. plant of ASG Industries, Inc., **(sheet glass);** 1,200 former workers at PPG Industries, Inc. plants in Henryetta, Okla., and Clarksburg, W.Va., **(sheet glass).** Investigation led to the conclusion that increased imports was not the major closure factor.

International Trade Briefs

Canada—Restriction of Oil Imports to the United States: The Canadian Minister of Energy, Mines, and Resources announced that Canada would reduce the maximum allowable exports of crude oil to the United States from 973,000 to 800,000 barrels per day as of Jan. 1, 1975. It was also stated that oil exports will be cut to 650,000 barrels per day by July 1, 1975, if the producing provinces agree to restrict production. The Canadian Government had previously made it clear that, unless substantial new oil reserves are discovered and developed, Canada will have to curtail drastically exports to the U.S. and end them by the early 1980s.

Dumping Cases: Canada has announced initiation of preliminary investigations into alleged injurious dumping of the following products from the United States: **color TV sets** having an overall diagonal measurement across the picture tube of 16 inches and over; **molded plastic statuettes** with inscriptions, known as "sillisculpts."

A preliminary determination of dumping has been made regarding **frozen, prepared, and precooked dinners** originating in the United States. The matter has now been referred to the Anti-dumping Tribunal for consideration of material injury.

The Anti-dumping Tribunal found that the dumping of **tetanus immune globulin (human)** manufactured by Cutter Laboratories, Berkeley, has caused material injury to production in Canada of like goods.

Worldwide Business Outlook

Brazilian Development Push Seen Strengthening Demand

Brazil is continuing the rapid rate of expansion established during the past six years, and its determination to expand domestic industry during the upcoming Second National Development Plan should open enlarged possibilities for American capital goods exports as well as direct investments.

The American Consulate General in Rio de Janeiro reports that Brazil began the year with a sharp expansionary burst, but has slowed to a more reasonable pace. Industrial production should grow by approximately 11 percent and agricultural output by about 8 percent this year, permitting an overall economic expansion of about 10 percent. The Minister of Finance projects this year's inflation rate at 32 percent, as measured by the Guanabara Consumer Price Index.

The balance of payments is becoming a significant concern. Brazil's 1974 imports may approximate $12 billion while its exports are unlikely to exceed $7.5 billion. This trade deficit will help raise Brazil's gross foreign debt to about $19 billion by the end of December. Because the balance of payments must be improved, and because of recession conditions in much of the industrialized world, Brazilian Finance Minister Simonsen has indicated that Brazilian economic growth is likely to dip in 1975, but the growth rate should remain at least five percentage points above rates in the leading industrialized nations.

President Ernesto Geisel has announced his administration's proposal for the Second National Development Plan covering the years 1975-1979. The administration's goals and projects constitute an especially ambitious program. The Plan foresees an average annual growth in gross domestic product of 10 percent, a rate comparable to the rapid expansion of the past few years. Investments in basic industries, science and technology, and economic infrastructure during the five-year period are projected at Cr$716 billion (US$101 billion at current exchange rate).

This investment program is designed to provide an annual growth of 12 percent in the industrial sector and 7 percent in agriculture. Priority development industries will be those producing steel, fertilizers, non-metallic minerals, petrochemicals, paper and cellulose, pharmaceutical products and all types of capital goods. The private sector will be expected to provide the bulk of capital and managerial resources needed in this program, but the government will actively support efforts to achieve the Development Plan's goals.

Several of the policies initiated during the past few years will continue under the forthcoming development program. They include: a balanced government budget; a persistent anti-inflation policy; the signing of additional taxation treaties; maintenance of monetary correction, wage policies, price controls, and mini-devaluations of the cruzeiro; extensive export incentives; and a high level of international reserves.

Industrial decentralization

The program envisages a significant regional decentralization of the industrial sector. An effort will be made to reduce the gap between the relatively high incomes of southeastern Brazil and the much lower incomes received in the north-northeast. The northeast, often described as the most densely populated and poorest region of the country, will enjoy special attention. Its industrial output is projected to increase 15 percent per year, its agricultural sector by 7 percent per year. The region's industrial efforts will concentrate mostly on production of fertilizers, petrochemicals, textiles, leather goods and other agro-industrial products.

The Amazon and central-west portions of the country will receive stimuli principally for mining and agricultural enterprises. These enterprises will focus mostly on producing an ever increasing volume of beef, wood products, rubber, cocoa, sugar, fruits and rice. The two outstanding mining projects are the iron ore/steel complex at Carajas/Itaqui and the bauxite-aluminum operations at Trombetas/Belem.

The government acknowledges the need for several basic adjustments in the economy. The most pressing need, of course, stems from the sharp rise in petroleum prices. The pressure that these price increases are placing on the balance of payments and on industrial costs will force Brazil to alter significantly its energy policies. In addition to conserving energy by such measures as placing greater emphasis on mass transportation, the government plans to rapidly augment domestic energy production. A recent major discovery of offshore oil near Rio de Janeiro has aroused high hopes in Brazil that its great dependence on oil imports may in time be overcome.

Underlining the nation's need to earn more foreign exchange, the government will promote rapid growth in exports. The agricultural sector is expected to

BALTIMORE TO BRAZIL—*Workmen band and label pallets containing checker-type refractories made by the General Refractories Co., Pittsburgh. More than 130 railroad boxcars were needed to ship the 449,000 checker brick to Baltimore where they were loaded aboard ship for Usinas Siderurgcias De Minas Gerais, S.A.'s new blast furnace and stoves.*

provide larger exportable surpluses than in the past. The export sector, which will be given additional stimuli, is expected to increase its sales of computers, ships, automotive products, agricultural machinery, steel products, precision instruments and minerals. At the same time, renewed efforts will be made to strengthen domestic industries, both as a means of conserving foreign exchange and as a step toward developing a modern industrial society.

The Brazilians aim to hold imports in 1975 to the 1974 level, and are currently adopting import restriction measures. Success is problematical, and certainly over the longer run, if not in the short term, U.S. exports to Brazil should continue to expand rapidly as they accompany the upward trend of Brazil's total imports. American sales to Brazil in 1973 totaled $1.9 billion (c.i.f.); major items were fertilizers, chemicals, wheat, aircraft and tractors. Through September of this year, imports from the United States reached $2.06 billion (f.o.b.), suggesting that by the end of the year they may climb to $2.8 billion. Undoubtedly, the same products that figured so prominently in U.S. exports during the past few years will continue to find a good market in the future.

Such items as fertilizers, wheat and small aircraft, however, may encounter greater competition from domestic production. In most cases, nevertheless, increased domestic output may merely offset the growth in demand rather than reduce imports.

In addition, the demand for capital goods should open large new trade opportunities, especially in those sectors that the government will stimulate as part of the National Development Plan. Special attention may well be given to the steel expansion program and the Itaipu hydroelectric project. These two programs will generate machinery imports of, respectively, some $1.1 billion and $700 million.

Fulfillment of the Second National Development Plan will undoubtedly require considerable new foreign investment. With domestic industry already working at or near capacity, additional productive facilities will have to be built. Most of the financing for these projects will come from domestic sources. The volume of projected investments, however, will exceed domestic savings, creating a need for both direct foreign investments and long-term credits. In addition, Brazil will likely seek to draw on the managerial skills and market networks of major multinational companies.

The government has, however, indicated that it would prefer that such direct investments be channeled directly into the primary and secondary sectors, leaving the tertiary sector to domestic entrepreneurs. Even with this limitation, foreign corporations should find ample opportunity for investment in the many sectors being rapidly expanded.

New Commerce Study Cites $10 Billion Brazilian Potential

A comprehensive new study, *Brazil: Survey of U.S. Export Opportunities*, alerts American businessmen to a potential $10 billion market for machinery, equipment and services in Brazil by 1978. The report, published by the Commerce Department's Domestic and International Business Administration, presents findings of a joint Commerce-State market research team that spent six months studying machinery and equipment needs in 14 sectors of the Brazilian economy and interviewing Brazilian Government planners on the subject of Brazil's swift industrial growth in recent years.

Continued expansion and modernization in the 14 major market areas covered is expected to provide new opportunities for U.S. equipment manufacturers, investors, lenders, construction contractors, and engineering and other specialized consultants.

The 241-page publication is available at $3.10 a copy from Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402, or through any Commerce Department District Office.

Ecuador Uses New Wealth In Building, Buying Surge

Undoubtedly many American businessmen still think of Ecuador in terms of its picturesque aspects astride South America's majestic Andes, a land of Inca ruins, colorful Indians, and snowcapped volcanoes.

Ecuador may be all of this, but it is also a country of great agricultural and industrial development activity, hundred-million-dollar power projects, an expansive economy and an enviable international credit rating. Since the nation joined the exclusive club of petroleum-producing and exporting countries in August 1972, it has embarked upon a campaign of development in all fields.

Ecuador is in a building and buying boom period, states Norman C. LaBrie, Commercial Attache at the U.S. Embassy in Quito. LaBrie notes that demand for import permits rose nearly 84 percent the first three quarters of this year. He believes that American exporters can supply much of Ecuador's burgeoning needs, and his report to the Department of Commerce cites many opportunities and offers suggestions for capitalizing on them.

With barely 6.5 million inhabitants, a high population growth rate, and one of the lowest per capita incomes in Latin America, Ecuador long remained one of the least-developed countries in the Western Hemisphere. The discovery of exportable deposits of petroleum in the Amazon, or "Oriente" region, provided the country with the means to rise from its economic doldrums, and in late 1972 the military government of Gen. Guillermo Rodriguez Lara launched an ambitious and extensive Five-Year National Development Plan (1973-77).

Since 1972, when the Texaco-Gulf consortium began piping crude over the Andes and shipping it out of the port city of Esmeraldas, exportation has been on the order of 210,000 to 240,000 barrels per day—not highly impressive but sufficient to make Ecuador the second-largest petroleum exporter in South America and to provide the Ecuadorean Government in 1973 with about $130 million in taxes and royalties.

Despite somewhat lower production in 1974, but as a result of substantially higher petroleum prices, government revenues this year are expected to be well over $500 million. With reserves estimated to last another 20 years at present production levels, the outlook for Ecuador's long-term development is encouraging.

Petroleum revenues have worked a significant transformation on the country's economy, which previously depended almost solely on banana, sugar and other traditional agricultural exports for foreign exchange. The sucre is now one of the most stable currencies in South America. Gross domestic product grew at a rate of 13 percent in 1973, the highest in Latin America. International monetary reserves, now over the $330 million mark, have nearly tripled since 1971. A positive and still improving trade balance will certainly assist in achieving a favorable balance of payments by year's end. Savings deposits rose by 21 percent in the year ending May 31.

U.S. suppliers will find that Ecuador offers a rapidly growing market for their goods and services. The Five-Year Development Plan has opened opportunities for provision of a wide variety of consulting, design and engineering services as well as capital goods and many luxury items. Despite remaining high duties on luxury goods, there has been in 1974 a doubling in value of import license applications over the same period last year.

As the driving force behind the country's development programs, the government of course is also its largest purchaser. The agricultural sector is the nation's weakest—productivity rose at an annual rate of less than 1 percent in 1973—and to stimulate productivity, the government

ECUADOR GREETS GEORGIA MISSION—*A trade "trek" organized by Georgia's Department of Community Development recently visited Chile, Peru, and Ecuador. As the group arrived in Guayaquil, Mission Director Richard J. Allen described on local TV the U.S. businessmen's focus. Allen has just led a second trek to Romania and Bulgaria. These two missions are likely to bring multi-million dollar results in the next year or so, according to Louis W. Truman, Commissioner of the Department of Community Development.*

may spend as much as $400 million over the next several years. This year it has ordered some 800 farm tractors at a cost of nearly $21 million for distribution to farmers under long-term, low-interest loans. Multimillion dollar irrigation and land development projects such as the Guayas River Basin are either in the design or implementation stage. A local study has concluded that Ecuador will need 14,000 tractors to bring it up to the horsepower-to-hectare ratio required to reach an acceptable level of agricultural productivity. Other implements of all types will be needed.

The Ecuadorean Central Bank calculates that, in addition to revenues from petroleum, the nation will require foreign loans averaging $100 million annually in order to carry out planned infrastructure projects. Paute, one of several electrification projects, will, for example, cost about $196 million, $51.5 million of which has already been provided by the Inter-American Development Bank. In the petrochemical sector, a $100 million petroleum refinery is now under construction, and additional large investments are planned for an LPG plant, a pipeline distribution system, and phosphate and urea plants which will utilize natural gas deposits in the Gulf of Guayaquil.

Transportation is also being given top priority, notes LaBrie. Large amounts of imported earth-moving and construction equipment will be needed to implement the Ministry of Public Works' $200 million highway construction and maintenance program over the next 20 years. A superhighway planned between Quito and the nation's chief port and largest city, Guayaquil, will cost additional millions. Studies of the construction or expansion and modernization of several airports around the country have already begun, as has the expansion of several port facilities. Another study is presently under way to decide whether the country's antiquated railway system should be modernized or simply abandoned.

Other projects include a $30 million fishing complex complete with modern purse seiners, fish processing and refrigeration plants; an ambitious urban development program for Guayaquil; and expansion of the telecommunications system (Ecuador, incidentally, is the only South American nation to have color television, utilizing the American NSTS system).

The private sector has by no means been neglected. Top priority industrial development projects, largely taken from Ecuador's assignments with the Andean Common Market, are bolstered by an incentive program; feasibility studies and promotion of these projects is conducted by the Ministry of Industries, Commerce and Integration's National Development Center (CENDES). A recently created government entity, the Army Industries Administration, is undertaking such construction projects as a munition plant, a steel mill, cement plants and factories to produce pumps and tools. U.S. firms have an opportunity to compete for most of these projects with financing, perhaps some investment, technology and turn-key construction.

Finally, the Ecuadorean armed forces, which receives 13 percent of total petroleum revenues, is interested in purchasing a variety of non-military as well as military equipment.

The effect of the government's promotional role in all areas of national development is readily seen in the substantial rise in imports in 1974. As noted, the value of total import permits issued between January and September of this year was nearly 84 percent higher than in the same period in 1973, rising from $330.9 million to $608.5 million. Despite this import rise, Ecuador during the same period showed a healthy trade surplus of $196 million. In its concern over a growing inflationary situation, the government is encouraging imports as a means of siphoning off excess money and in the past few years has reduced or completely eliminated duties on imports of certain capital and luxury goods.

Ecuador also welcomes foreign investment, but may be expected to demand strict compliance with Decision 24, which regulates treatment of foreign capital under the Andean Pact. Investors are also advised that Ecuador's policy regarding its national resources is highly protectionist, and that stringent conditions are imposed upon any foreign investment in this sector.

U.S. businessmen, although they will find that many trade opportunities exist for their products and services in Ecuador, should be prepared to face active competition by foreign firms in every type of venture, and in many cases the going will not be easy. Under law, major government purchases of goods and services must be let by public tender, and deadlines for qualification of firms and submission of bids are often shorter than is practical. Local law also requires that intending bidders first acquire an Ecuadorean legal representative. Ecuador is now a buyer's market for most goods, with competitors standing in line for the opportunity to sell.

The American businessman interested in doing business in Ecuador is advised by LaBrie to adhere to the following guidelines:

- Communicate in Spanish if at all possible and if indicated;
- At an opportune moment in negotiations, do not hesitate to visit Ecuador to conclude the transaction. Letters and cables addressed to local companies and public agencies often are not received or remain unanswered for a number of reasons;
- Before arriving, take time to learn more about the country's economy and business conditions and requirements;
- Once in Ecuador, remain as long as necessary. The 24-hour stopover usually is insufficient and may give the impression of lack of real interest;
- If you are interested in a specific business venture, go prepared with a concrete proposal and all pertinent data; and
- Lastly, if all this requires too much effort, remember that foreign competitors have already adapted to these rules.

Guidance on locating agents, market surveys, market data, or general economic information regarding Ecuador may be obtained from the nearest Commerce District Office (see list on inside back cover).

Holiday Calendar Can Aid Business Travel Planning

July 9 is Argentina's Independence Day, while the USSR will be observing Victory Day on May 9. Sept. 16 is Mexico's Anniversary of the Proclamation of Independence.

These are some of hundreds of commercial holidays abroad that U.S. businessmen are advised to consider in planning overseas business travel. In fact, there are only a few days in 1975 when there will be no commercial holidays somewhere in the world that will probably close both business and government offices in the celebrating countries.

On this and following pages, commercial holidays are listed for a total of 135 countries, presented alphabetically, around the world.

The list was compiled from data assembled by Commercial Officers at U.S. Foreign Service Posts abroad.

Many commercial holidays occur on different calendar dates from year to year. Holidays and even weekends often vary from country to country, and from region to region. Some holidays do not recur from one year to the next, while other holidays may vary in duration as well as calendar date.

In cases where holidays fall on Saturday or Sunday commercial establishments may be closed on the preceding Friday or following Monday.

For many countries, such as those in the Moslem world, holiday dates can be only approximate because they are based on the lunar calendar. Note that references to the Moslem holidays often vary in spelling and dates, and that businesses in many Moslem countries are closed on Fridays.

The calendar is intended as a working guide only. Corroboration of dates is suggested in final business travel planning.

Although U.S. holidays are not included in this schedule, they should also be considered when appointments are made with U.S. Commercial Officers abroad.

AFGHANISTAN—Jan. 22 est. (Tenth of Moharram), March 21 (Nawroz), March 25 est. (Milad-e-Nabi), May 27 (Independence Day), July 17-19 (Republican Day), Aug. 31 (Pashtunistan Day), Sept. 7 est. (First of Ramazan)*, Sept. 9 (National Assembly Day), Oct. 7 est. (Id-e-Fitr)*, Oct. 15 (Deliverance Day), Dec. 13-16 est. (Id-e-Azha). * Offices remain open.

The regular weekend holiday is from Thursday noon through Friday. Saturday and Sunday are regular workdays. Due to recent establishment of a new regime, it is possible that there will be changes or additions in holidays during 1975.

ALGERIA—Jan. 1 (New Year's), Jan. 14 est. (Moharem), Jan. 23 est. (Aachoura), March 25 est. (El Mawlid en Nabaoui), May 1 (May Day), June 19 (Anniversary of the 19th of June), July 5 (Independence Day), Oct. 6-7 est. (Aid el Fitr), Nov. 1 (Anniversary of the Start of the Algerian Revolution), Dec. 13-14 est. (Aid el Adha).

ANGOLA—Jan. 1 (New Year's), June 10 (Dia da Raca), Aug. 15 (Restoration Day), Oct. 5 (Republic Day), Nov. 1 (All Saints), Dec. 1 (Independence Day), Dec. 8 (Immaculate Conception), Dec. 25 (Christmas).

ARGENTINA—Jan. 1 (New Year's), Jan. 6 (Epiphany), Feb. 10-11 (Carnival), March 27 (Holy Thursday), March 28 (Holy Friday), May 1 (Labor Day), May 25 (Anniversary of 1810 Revolution), May 29 (Corpus Christi), June 20 (Flag Day), July 9 (Independence Day), Aug. 15 (Assumption of the Virgin Mary), Aug. 17 (Death of General San Martin), Oct. 12 (Columbus Day), Nov. 1 (All Saints), Dec. 8 (Immaculate Conception), Dec. 25 (Christmas).

Regional holidays: Nov. 10 (Day of Tradition), Prov. of Buenos Aires; Nov. 11 (Saint Martin de Tours), City of Buenos Aires.

AUSTRALIA—Jan. 1 (New Year's), Jan. 27 (Australia Day), March 28 (Good Friday), March 31 (Easter Monday), April 25 (ANZAC Day), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

Regional holidays: March 3 (Eight hour Day), Tasmania; March 3 (Labor Day), Western Australia; March 10 (Labor Day), Victoria; March 12 (Canberra Day), Canberra; May 5 (Labor Day), Queensland; May 12 (Adelaide Cup Day), South Australia; June 2 (Foundation Day), Western Australia; June 16 (Queen's Birthday), all States except Western Australia; Aug. 13 (Exhibition Day), Queensland; Sept. 15 (National Day), Papau, New Guinea; Sept. 25 (Show Day), Melbourne, Victoria; Sept. 30 (Show Day), Western Australia; Oct. 6 (Labor Day), Australian Capital Territory, New South Wales and Papua, New Guinea; Oct. 13 (Labor Day), South Australia; Oct. 13 (Queen's Birthday), Western Australia; Nov. 3 (Bank Holiday), Tasmania; Nov. 4 (Melbourne Cup Day), Victoria.

AUSTRIA—Jan. 1 (New Year's), Jan. 6 (Epiphany), March 31 (Easter Monday), May 1 (Labor Day), May 8 (Ascension), May 19 (Whit Monday), May 29 (Corpus Christi), Aug. 15 (Assumption), Nov. 1 (All Saints), Dec. 8 (Immaculate Conception), Dec. 24 (Bank Holiday), Dec. 25 (Christmas), Dec. 26 (St. Stephan's), Dec. 31 (Bank Holiday).

Regional holidays: March 19 (St. Joseph), Carinthia, Styria, Tyrol, Vorarlberg; Sept. 24 (St. Rupert), Salzburg; Oct. 10 (Plebiscite Anniversary), Carinthia; Nov. 11 (St. Martin), Burgenland; Nov. 15 (St. Leopold), Lower Austria, Upper Austria, Vienna. These holidays are mainly observed by schools and farmers. Some public offices and a few business enterprises may also be closed, but their number is declining.

Many businesses will be closed on the following days which are part of long weekends: Jan. 2-3, May 9, May 30.

BAHAMAS—Jan. 1 (New Year's), March 28 (Good Friday), March 31 (Easter Monday), May 19 (Whit Monday), June 6 (Labor Day), July 10 (Independence Day), Aug. 4 (Emancipation Day), Oct. 13 (Discovery Day), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

BAHRAIN—Jan. 1 (New Year's), Jan. 13 est. (Muslim New Year), Jan. 21-22 est. (Ashura), March 24 est. (Prophet's Birthday), Oct. 13-15 est. (Id Al-Adha), Dec. 16 (National Day).

BARBADOS—Jan. 1 (New Year's), March 28 (Good Friday), March 31 (Easter Bank Holiday), May 1 (May Day), May 19 (Whit Monday), Aug. 4 (Emancipation Day), Oct. 6 (Clerks' Day, U.N. Day), Dec. 1 (Independence Day), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

BELGIUM—Jan. 1 (New Year's), March 31 Easter Monday), May 1 (Labor Day), May 8 (Ascension), May 19 (Whit Monday), July 21 (Independence Day), Aug. 15 (Assumption), Nov. 1—celebrated 2nd (All Saints), Nov. 2 (All Souls), Nov. 11 (Veterans' Day), Dec. 25 (Christmas), Dec. 26 (Boxing Day)—most offices remain open.

Regional holiday: July 11 (Flemish Holiday), Flanders.

BELIZE—Jan. 1 (New Year's), March 9—celebrated 10th (Baron Bliss Day), March 28-31 (Easter), April 21 (Queen's Birthday), May 1 (Labor Day), May 23 (Commonwealth Day), Sept. 10 (National Day), Nov. 14 (Prince Charles' Birthday), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

Regional holidays: Oct. 12—celebrated 13th (Columbus Day), Corozal and Orange Walk Districts: Nov. 19 (Carib Settlement Day), Stann Creek and Toledo Districts.

BERMUDA—Jan. 1 (New Year's), March 28 (Good Friday), May 24 with public holiday on May 26 (Commonwealth-Empire-Day), June 14 with public holiday on June 16 (Queen's Birthday), July 31 (Cup Match), Aug. 1 (Somers Day), Nov. 11

HOLIDAY TRADITION—*This listing shows that Christmas is among the most widely observed of world holidays. The Christmas tree is an ancient custom in many countries.*

(Remembrance Day), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

BOLIVIA—Jan. 1 (New Year's), March 28 (Good Friday), May 1 (Labor Day), May 29 (Corpus Christi), July 16 (La Paz Day), Aug. 6 (Independence Day), Dec. 25 (Christmas).

BOTSWANA—Jan. 1 (New Year's), March 28-31 (Easter), May 8 (Ascension), May 19 (Whit Monday), May 26 (President's Day), June 22 (Commonwealth Day), Aug. 4 (1st Monday in Aug.), Sept. 30 (Botswana Day), Oct. 24 (U.N. Day), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

BRAZIL—Jan. 1 (New Year's), Feb. 10-11 (Carnival), March 28 (Good Friday), April 21 (Tiradentes), May 1 (Labor Day), Sept. 7 (Independence Day), Nov. 2 (All Souls), Nov. 15 (Proclamation of the Republic), Dec. 25 (Christmas).

Regional Holidays: Jan. 20 (San Sebastian Day), Rio de Janeiro; Jan. 25 (Sao Paulo Anniversary), Sao Paulo; Oct. 12 (N. S. Aparecida), Brasilia; Dec. 8 (Immaculate Conception), Brasilia.

BULGARIA—Jan. 1 (New Year's), May 1-2 (May Day), May 24 (National Education Day), Sept. 9-10 (Liberation Day), Nov. 7 (October Revolution Day).

The day preceding a Bulgarian holiday is generally a half day of work.

BURMA—Jan. 4 (Independence Day), Jan. 12 (Karen New Year), Feb. 12 (Union Day), March 2 (Peasants' Day), March 26 (Fullmoon of Tabaung), March 27 (Resistance Day), April 14-16 (Thingyan—Water Festival), April 17 (Burmese New Year), May 1 (Workers' Day), May 24 (Fullmoon of Kason), July 19 (Martyrs' Day), July 22 (Fullmoon of Waso), Oct. 19 (Fullmoon of Thadingyut), Nov. 17 (Fullmoon of Tazaungmon), Nov. 27 (National Day), Dec. 25 (Christmas).

BURUNDI—Jan. 1 (New Year's), March 31 (Easter Monday), May 1 (Labor Day), May 8 (Ascension), May 19 (Pentecost), July 1 (Independence Day), Aug. 15 (Assumption), Sept. 18 (Victory of Uprona Party), Oct. 13 (Assassination of National Hero), Nov. 1 (All Saints), Nov. 28 (Republic Day), Dec. 25 (Christmas).

CAMEROON—Jan. 1 (New Year's), Jan. 4 est. (Feast of the Lamb), Feb. 11 (Youth Day), March 28 (Good Friday), May 1 (Labor Day), May 8 (Ascension Thursday), May 20 (National Day), Aug. 15 (Assumption Day), Oct. 26 est. (End of Ramadan), Dec. 25 (Christmas).

CANADA—Jan. 1 (New Year's), March 28 (Good Friday), March 31 (Easter Monday), May 19 (Victoria Day), July 1 (Dominion Day), Sept. 1 (Labor Day), Oct. 13 (Thanksgiving Day), Nov. 11 (Remembrance Day), Dec. 25 (Christmas).

Regional holidays: Aug. 4 (Civic Holiday), Ontario, Alberta, British Columbia, and Manitoba; Dec. 26 (Boxing Day), observed in Province of Quebec by provincial and municipal government offices—commercial businesses are open after 1 p.m.

CENTRAL AFRICAN REPUBLIC—Jan. 1 (New Year's), Feb. 22 (President Bokassa's Birthday), March 29 (Anniversary of President Boganda's death), May 1 (Labor and Mother's Day), Aug. 13 (Independence Day), Dec. 1 (Proclamation of the Central African Republic), Dec. 25 (Christmas).

Most business and government employees will observe the following religious holidays: March 31 (Easter Monday), May 9 (Ascension), May 19 (Pentecost), Aug. 15 (Assumption), Nov. 1 (All Saints).

Additional holidays are often declared on short notice.

CHAD—Jan. 1 (New Year's), Jan. est. (Aid el Kebir), Jan. 11 (National Day), March 31 (Easter Monday), April 2, 3 or 4 est. (Maloud el Nebi), May 1 (Labor Day), May 8 (Ascension), June est. (African Continent Liberation Day), May 18-19 (Pentecost), Aug. 11 (Independence Day), Aug. 15 (Assumption), Aug. 27 (2nd Anniversary of the Founding of the M.N.R. C.S.), Nov. 1 (All Saints), Nov. 28 (Proclamation of the Republic), Dec. est. (Aid el Sakhair), Dec. 25 (Christmas).

CHILE—Jan. 1 (New Year's), March 28 (Good Friday), March 29 (Easter Saturday), May 1 (Labor Day), May 21 (Battle of Iquique), Aug. 15 (Assumption), Sept. 18-19 (Independence Day), Oct. 12 (Columbus Day), Nov. 1 (All Saints), Dec. 8 (Immaculate Conception), Dec. 25 (Christmas).

PEOPLE'S REPUBLIC OF CHINA—Jan. 1 (New Year's), Feb. 11-13 (Spring Festival), May 1 (Labor Day), Oct. 1-2 (National Day).

COLOMBIA—Jan. 1 (New Year's), Jan. 6 (Epiphany), March 19 (St. Joseph's Day), March 27 (Maundy Thursday), March 28 (Good Friday), May 1 (Labor Day), May 8 (Ascension), May 29 (Corpus Christi), June 6 (Feast of the Sacred Heart), June 29 (Sts. Peter and Paul), July 20 (Independence Day), Aug. 7 (Battle of Boyaca), Aug. 15 (Assumption), Oct. 12 (Columbus Day), Nov. 1 (All Saints), Nov. 11 (Independence of Cartagena), Dec. 8 (Feast of Immaculate Conception), Dec. 25 (Christmas).

COSTA RICA—Jan. 1 (New Year's), March 19 (St. Joseph's Day), March 28-31 (Easter), April 11 (Juan Santamaria), May 1 (Labor Day), May 29 (Corpus Christi), June 29 (Sts. Peter and Paul), July 25 (Annexation of Guanacaste), Aug. 2 (Feast of Our Lady of the Angels), Aug. 15 (Assumption), Sept. 15 (Independence), Oct. 12 (Columbus Day), Dec. 8 (Immaculate Conception), Dec. 25 (Christmas).

CYPRUS—Jan. 1 (New Year's), Jan. 6 (Epiphany), Jan. 19 (Archbishop Makarios Name Day), March 17 (Green Monday), March 25 (Greek Independence Day), March 25 (Birthday of the Prophet), April 1 (EOKA Day), April 23 (Opening of Turkish Grand National Assembly), May 2 (Good Friday), May 3 (Holy Saturday), May 4 (Greek Easter), May 5 (Easter Monday), May 19 (Turkish Youth Day), Aug. 15 (Assumption), Aug. 30 (Turkish Victory Day), Oct. 6 (Ramazan Bairam), Oct. 28 (Ohi Day), Oct. 29 (Turkish Republic Day), Dec. 13 (Kurban Bairam), Dec. 24-25 (Christmas), Dec. 26 (Boxing Day).

CZECHOSLOVAKIA—Jan. 1 (New Year's), March 31 (Easter Monday), May 1 (May Day), May 9 (National Day), Oct. 28 (State Holiday), Dec. 25-26 (Christmas).

Regional holiday: Aug. 29 in Slovakia.

DAHOMEY—Jan. 1 (New Year's), March 31 (Easter Monday), May 1 (May Day), Aug. 1 (Independence Day), Aug. 15 (Assumption), Oct. 26 (Revolution), Nov. 1 (All Saints), Dec. 25 (Christmas).

Holidays for El Kebir, Id Ed Mulud, Ascension, and Pentecost are variable on their dates and have not been announced.

DENMARK—Jan. 1 (New Year's), March 27 (Maundy Thursday), March 28 (Good Friday), March 31 (Easter Monday), April 25 (Prayer Day), May 8 (Ascension), May 19 (Whit Monday), June 5 half-day (Constitution Day), Dec. 25 (Christmas), Dec. 26 (2nd Christmas Day).

May 1 (Labor Day), Dec. 24 and Dec. 31 are traditional half-day holidays; however, as on June 5 (official half-day holiday), most businesses and banks are closed.

SHOPPING IN PARIS—*Buyers in a French department store look over merchandise from around the world. Stores and other commercial establishments close for many French holidays.*

DOMINICAN REPUBLIC—Jan. 1 (New Year's), Jan. 21 (Dia de Ntra. Sra. de la Alta), Jan. 26 (Dia de Duarte), Feb. 27 (Independence Day), March 28 (Good Friday), May 1 (Labor Day), May 29 (Corpus Christi), Aug. 16 (Restoration Day), Sept. 24 (Dia de Ntra. Sra. de las Mercedes), Dec. 25 (Christmas).

ECUADOR—Jan. 1 (New Year's), March 28 (Good Friday), May 1 (Labor Day), May 24 (Quito Independence Day), Aug. 10 (First Proclamation of Independence), Oct. 9 (Guayaquil Independence Day), Oct. 12 (Columbus Day), Nov. 2 (All Souls), Nov. 3 (Cuenca Independence Day), Dec. 25 (Christmas).

Regional holiday: Dec. 6 (Foundation of Quito), Quito.

EGYPT—Jan. 13 est. (Islamic New Year), Feb. 22 (Unity Day), March 24 est. (Moulid El Nabi), April 7 (Sham El Nassim), June 18 (Evacuation Day), July 23 (Revolution Day), Oct. 2-5 est. (Ramadan Bairam), Oct. 6 (Armed Forces Day), Oct. 24 (Suez and Popular Resistance Day), Dec. 11-15 est. (Kurban Bairam), Dec. 23 (Victory Day).

EL SALVADOR—Jan. 1 (New Year's), March 24-26 (Holy Week)—government only, March 27-28 (Holy Week), May 1 (Labor Day), June 22 (Teachers' Day)—government only, Aug. 1 (Feast of San Salvador) — government only, Aug. 4-6 (Feast of San Salvador), Sept. 15 (Independence Day), Nov. 5 (First Cry of Independence), Dec. 24-Jan. 2 (Christmas holidays) — government only, Dec. 25 (Christmas).

ETHIOPIA—Jan. 7 (Ethiopian Christmas), Jan. 20 (Ethiopian Epiphany), Feb. 19 (Martyrs of Yekatit), May 2 (Good Friday), May 5 (Easter Monday), Aug. 22 (Feast of the Assumption), Sept. 12 (Ethiopian New Year), Sept. 27 (Finding of the True Cross).

FIJI—Jan. 1 (New Year's), March 24 (Prophet Mohammed's Birthday), March 28 (Good Friday), March 29-31 (Easter), June 16 (Queen's Birthday), Aug. 4 (Bank Holiday), Oct. 6 (Fiji Day), Nov. 3 Deepawali), Nov. 17 (Prince Charles' Birthday), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

FINLAND—Jan. 1 (New Year's), Jan. 11 (Epiphany), March 23 (Good Friday), March 30-31 (Easter), May 1 (May Day), May 3 (Ascension), May 17 (Whitsun Eve), June 20 (Eve of Midsummer's Day), June 21 (Midsummer's Day), Nov. 1 (All Saints), Dec. 6 (Independence Day), Dec. 24-26 (Christmas).

Banks are closed the afternoons of March 27 and Dec. 31. Many businesses are closed the afternoon of the workday immediately preceding a Finnish holiday.

FRANCE—Jan. 1 (New Year's), March 31 (Easter Monday), May 1 (Labor Day), May 8 (Ascension), May 19 (Whit Monday), July 14 (Bastille Day), Aug. 15 (Assumption), Nov. 1 (All Saints), Nov. 11 (Veterans' Day), Dec. 25 (Christmas).

August is regarded in France as a poor month for conducting business, as most firms are closed for vacation.

FRENCH POLYNESIA—Jan. 1 (New Year's), March 31 (Easter Monday), May 1 (Labor Day), May 8 (Ascension), May 19 (Pentecost Monday), July 14 (National Holiday), Aug. 15 (Assumption), Nov. 1 (All Saints), Nov. 11 (Armistice Day), Dec. 25 (Christmas).

GABON—Jan. 1 (New Year's), March 12 (Renovation Day), March 31 (Easter Monday), May 1 (Labor Day), May 8 (Ascension), May 19 (Pentecost), Aug. 15 (Assumption), Aug. 17 (Independence Day), Nov. 1 (All Saints), Dec. 4 (Anniversary of Leon M'Ba's Death), Dec. 25 (Christmas).

GAMBIA—Jan. 1 (New Year's), Feb. 18 (National Day), March 28 (Good Friday), March 31 (Easter Monday), Aug. 18 (Feast of the Assumption of the Virgin Mary), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

Holidays of Ed-el-Fitr (2 days), Id-el-Kabir, and Feast of Maulud Nabi vary by day and month depending on lunar calendar.

GERMAN DEMOCRATIC REPUBLIC—Jan. 1 (New Year's Day), March 28 (Good Friday), May 1 (May Day), May 19 (Whit Monday), Oct. 7 (Republic Day), Dec. 25-26 (Christmas).

GERMANY, FEDERAL REPUBLIC OF, AND WEST BERLIN—Jan. 1 (New Year's), March 28 (Good Friday), March 31 (Easter Monday), May 1 (Labor Day), May 8 (Ascension), May 19 (Whit Monday), June 17 (Day of German Unity), Nov. 19 (Repentance Day), Dec. 24 (Christmas Eve afternoon), Dec. 25-26 (Christmas).

Regional holidays: Jan. 6 (Epiphany), Baden-Wuerttemberg and Bavaria; Feb. 10 (Rose Monday), Bonn, Cologne, Duesseldorf, Mainz, and other Catholic areas celebrating Carnival; May 29 (Corpus Christi), North Rhine-Westphalia, Hesse, Rhineland-Palatinate, Saarland, Baden-Wuerttemberg, and Catholic areas of Bavaria; Nov. 1 (All Saints), North Rhine-Westphalia, Baden-Wuerttemberg, Rhineland-Palatinate, Saarland, Catholic areas of Bavaria.

GHANA—Jan. 1 (New Year's), Jan. 13 (National Redemption Day), March 6 (Independence Day), March 28 (Good Friday), March 29 (Easter Saturday), March 31 (Easter Monday), July 1 (Republic Day), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

GREECE—Jan. 1 (New Year's), Jan. 6 (Epiphany), March 17 (Kathara Deftera), March 25 (Independence Day), May 1 (May Day), May 2 (Good Friday), May 3 half-day (Good Saturday), May 5 (Easter Monday), June 23 (Whit Monday), Aug. 15 (Assumption), Sept. 14 half-day for shops (Holy Cross Day), Oct. 27 half-day for government services (Oxi Day Eve), Oct. 28 (Oxi Day), Dec. 24 half-day except for shops (Christmas Eve), Dec. 25 (Christmas), Dec. 26 (Boxing Day), Dec. 31 half-day except for shops (New Year's Eve).

Regional holidays: March 7 (Accession Day), Dodecanese Islands; Oct. 4 (Liberation of Xanthi), Xanthi; Oct. 26 (St. Demetrious Day), Thessaloniki; Nov. 30 (St. Andreas' Day), Patras.

GUATEMALA — Jan. 1 (New Year's), March 27 (Holy Thursday), March 28 (Good Friday), March 29 (Holy Saturday), May 1 (Labor Day), May 10 (Mother's Day), June 30 (Army Day), Aug. 15 (Feast of the Assumption), Sept. 15 (Independence Day), Oct. 20 (Revolution Day), Nov. 1 (All Saints), Dec. 24 (Christmas eve afternoon), Dec. 25 (Christmas), Dec. 31 (New Year's eve afternoon).

Banks will also be closed the afternoon of March 26, and all day July 1 and Oct. 13.

GUINEA—Jan. 1 (New Year's Day), May 1 (Labor Day), May 14 (Anniversary of the Guinean Democratic Party), Sept. date to be announced (End of Ramadan Fast), Sept. 28 (Referendum Day), Oct. 2 (Independence Day), Nov. date to be announced (Tabaski, Feast of the Sacrifice), Nov. 22 (Anniversary of Invasion).

GUYANA—Jan. 1 (New Year's), sometime in January (Eid-Ul-Ahza), Feb. 23 (Republic Day), sometime in March (Phagwah), March 28 (Good Friday), March 31 (Easter Monday), sometime in April (Youman Naubi), May 1 (Labor Day), July 4 (Caricom Day), Aug. 4 (Commonwealth Day), Oct. 24 (U.N. Day), sometime in October (Deepavali), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

HAITI—Jan. 1 (New Year's and Independence Day), Jan. 2 (Ancestor's Day), Feb. 10 afternoon (Lundi Gras), Feb. 11 afternoon (Mardi Gras), March 28 afternoon (Good Friday), May 1 (Agriculture and Labor Day), May 18 (Flag and University Day), June 22 (Presidence a Vie), Oct. 17 (Anniversary of Death of Dessalines), Nov. 2 afternoon (All Souls), Dec. 25 (Christmas).

HONDURAS—Jan. 1 (New Year's), March 27 (Holy Thursday), March 28 (Good Friday), April 14 (Day of the Americas), May 1 (Labor Day), Sept. 15 (Central American Independence Day), Oct. 3 (Birth of General Francisco Morazan), Oct. 12 (Columbus Day), Oct. 21 (Armed Forces Day), Dec. 25 (Christmas).

HONG KONG—Jan. 1 (1st week-day in Jan.), Feb. 11-13 (Lunar New Year), March 28-31 (Easter), April 5 (Ching Ming Festival), April 21 (Queen's Birthday), June 14 (Tuen NG—Dragon Boat—Festival), July 1 (1st week-day in July), Aug. 4 (Liberation Day), Sept. 22 (2nd Day Following Chinese Mid-autumn Festival), Oct. 13 (Chung Yeung Festival), Dec. 25 (Christmas), Dec. 26 (1st week-day after Christmas Day).

HUNGARY—Jan. 1 (New Year's), March 31 (Easter Monday), April 4 (Liberation Day), May 1 (Labor Day), Aug. 20 (Constitution Day), Nov. 7 (Anniversary of the October Revolution), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

ICELAND—Jan. 1 (New Year's), March 27 (Maundy Thursday), March 28 (Good Friday), March 31 (Easter Monday), April 24 (First Day of Summer), May 1 (Labor Day), May 8 (Ascension), May 19 (Whit Monday), June 17 (Independence Day), Aug. 5 (Bank Holiday), Dec. 24 (Christmas Eve afternoon), Dec. 25 (Christmas), Dec. 26 (Boxing Day), Dec. 31 (New Year's Eve afternoon).

INDIA—Jan. 23 (Muharram), Jan. 26 (Republic Day), March 27 (Holi), March 28 (Good Friday), April 20 (Ramanavami), May 25 (Buddha Purnima), Aug. 15 (Independence Day), Aug. 20 (Janamashtami), Oct. 2 (Mahatma Ghandi's Birthday), Oct. 7 (Id-ul-Fitr), Oct. 13-14 (Duseehra), Nov. 3 (Diwali), Nov. 18 (Guru Nanak Day), Dec. 14 (Bakr Id), Dec. 25 (Christmas).

Additional local holidays frequently occur. Businessmen are advised to check with the U.S. Embassy, Santi Path, Chanakyapuri 21, New Delhi, for this information if they plan to travel outside New Delhi.

INDONESIA—Jan. 1 (New Year's), Jan. 14 (1st Muharam), March 25 (Mohammad's Birthday), March 28 (Good Friday), May 8 (Ascension of Jesus Christ), Aug. 5 (Ascension of Mohammad), Aug. 17 (Independence Day), Oct. 6-7 (Idul Fithri), Oct. 7 (End of Ramadan), Dec. 13 (Idul Adha), Dec. 25 (Christmas).

IRAN—Jan. 23 (Ashura), March 12 (Death of the Prophet and Death of Imam Hassan), March 21-22 (Iranian New Year), March 31 (Prophet Imam Jaffar Sadegh Birthday), April 2 (Sizdah), Aug. 5 (Constitution Day), Sept. 28 (Death of Imam Ali), Oct. 7

(Id-e-Fetr), Oct. 26 (Birthday of H.I.M. The Shah), Dec. 13 (Id-e-Ghorban), Dec. 21 (Id-e-Ghadir).

IRAQ—Jan. 1 (New Year's), Jan. 6 (Army Day), May 1 (Labor Day), July 14 (Declaration of the Republic), July 17 (Revolution Day).

Holidays of Id al-Adha, Islamic New Year, Ashura, Prophet's Birthday and Id al-Fitr vary by day and month depending on lunar calendar.

IRELAND—Jan. 1 (New Year's), March 17 (St. Patrick's Day), March 28 (Good Friday), March 31 (Easter Monday), June 2 (Bank Holiday), Aug. 4 (Bank Holiday), Dec. 25 (Christmas), Dec. 26 (St. Stephen's Day).

May 1 (May Day) may be declared a holiday.

ISRAEL—March 27 (Passover, first day), April 2 (Passover, last day), April 16 (Independence Day), May 16 (Pentecost), Sept. 6-7 (Rosh Hashana—New Year), Sept. 15 (Yom Kippur—Day of Atonement), Sept. 20 (First Day of Tabernacles), Sept. 27 (Last Day of Tabernacles).

On Fridays, and days preceding holidays, businesses close at 1 p.m. Sundays are working days in Israel and on Saturdays all businesses are closed.

Banks are closed on Feb. 25 (Purim) and July 17 (Commemoration of the Temple).

Between the first and last day of Passover and Tabernacles, some businesses and institutions close half days. A few factories take annual leave; others remain open.

ITALY—Jan. 1 (New Year's), Jan. 6 (Epiphany), March 19 (Feast of St. Joseph), March 31 (Easter Monday), April 25 (Liberation Day), May 1 (Labor Day), May 8 (Ascension), May 29 (Corpus Christi), June 2 (Founding of the Republic), Aug. 15 (Assumption), Nov. 1 (All Saints), Nov. 4 (National Unity Day), Dec. 8 (Immaculate Conception), Dec. 25 (Christmas), Dec. 26 (St. Stephens).

Regional holidays: June 24 (St. John's Day), Turin, Florence and Genoa; June 29 (Sts. Peter and Paul), Rome; July 15 (Feast of St. Rosalia), Palermo; Sept. 19 (Feast of St. Gennaro), Naples; Nov. 3 (Feast of St. Giusto), Trieste; Dec. 7 (Feast of St. Ambrose), Milan.

The month of August is a poor business period as many firms are closed for vacations.

SWISS FESTIVITIES—*Driving the cattle up to summer pastures is a time of colorful ceremony and holiday celebration in many parts of northeastern Switzerland. Here, in the canton of Appenzell, cattle pass through villages of the valley in a long column.*

IVORY COAST—Jan. 1 (New Year's), March 31 (Easter Monday), May 1 (Labor Day), May 8 (Ascension), May 19 (Pentecost), Aug. 15 (Assumption), Oct. date to be announced (End of Ramadan), Nov. 1 (All Saints), Dec. 7 (Independence Day—undetermined if Dec. 8 will be a holiday), Dec. 25 (Christmas), Dec. date to be announced (Tabaski).

JAMAICA—Jan. 1 (New Year's), Feb. 12 (Ash Wednesday), March 28 (Good Friday), March 31 (Easter Monday), May 23 (Labor Day), Aug. 4 (Independence Day), Oct. 20 (National Heroes Day), Dec. 25 (Christmas Day), Dec. 26 (Boxing Day).

JAPAN—Jan. 1 (New Year's), Jan. 15 (Adult's Day), Feb. 11 (National Foundation Day), March 21 (Vernal Equinox Day), April 29 (Emperor's Birthday), May 3 (Constitution Day), May 5 (Children's Day), Sept. 15 (Respect for the Aged Day), Sept. 24 (Autumnal Equinox Day), Oct. 10 (Sports Day), Nov. 3 (Culture Day), Nov. 23—observed on the 24th (Labor Thanksgiving Day).

JORDAN—Jan. 11 (Islamic New Year), March 23 (Prophet's Birthday), May 25 (Independence Day), Aug. 11 (King Hussein's Accession to Throne), Oct. 3 (Id Al Fitr), Nov. 14 (King Hussein's Birthday), Dec. 21 (Id Al Adha).

In addition, government institutions and some commercial and financial establishments close on the following days: Jan. 15 (Arbor Day), March 8 (Coronation of King Faisal), March 22 (Arab League Day), May 1 (Labor Day).

Many Moslem and Christian establishments close on Fridays, Christian businesses on Sundays.

KENYA—Jan. 1 (New Year's), March 28 (Good Friday), March 31 (Easter Monday), May 1 (Labor Day), June 2 (Madaraka Day), Oct. 10-11 est. (Idd-ul-Fitr), Oct. 20 (Kenyatta Day), Dec. 12 (Independence Day), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

KOREA—Jan. 1-3 (New Year Celebration), Feb. 11 (Lunar New Year), March 1 (Independence Movement Day), April 5 (Arbor Day), June 6 (Memorial Day), July 17 (Constitution Day), Aug. 15 (Independence Day), Sept. 20 (Thanksgiving Day), Oct. 3 (National Foundation Day), Oct. 9 (Alphabet Day), Oct. 24 (U.N. Day), Dec. 25 (Christmas).

KUWAIT—Jan. 1 (New Year's), Jan. 14 (Islamic New Year), Feb. 25 (National Day), March 25 (Birth of the Prophet), Aug. 5 (Ascension), Oct. 6-8 (Al-Fitr Eid), Dec. 12 (Waqfa), Dec. 13-15 (Eid Al-Adha.)

LAOS—Jan. 1 (International New Year's), Jan. 27 (Buddhist All Saints' Day), Feb. 21 (Anniversary of the Lao Peace Accord), March 1 (National Day of Support for Veterans and War Victims), March 23 (Armed Forces Day), April 14-16 (Lao New Year), April 25 (Birth Enlightenment and Death of Buddha), April 26 (Rocket Festival), May 1 (Labor Day), May 11 (Constitution Day), July 19 (Independence Day), July 23 (Beginning of Buddhist Lent), Sept. 5 (Day of the Dead), Sept. 14 (Anniversary of the Protocol for the Lao Peace Accord), Sept. 20 (Rice Donation), Oct. 20 (End of Buddhist Lent), Oct. 21 (Boat Races), Oct. 24 (U.N. Day), Nov. 16-19 (That Luang Festival).

LEBANON—Jan. 1 (New Year's), Jan. 13 est. (Moslem New Year), Jan. 23 est. (Ashoura), Feb. 9 (Saint Maron's Day), March 22 (Arab League Day), March 24 est. (Prophet's Birthday), March 28 (Good Friday—Catholic), March 31 (Easter Monday—Catholic), May 1 (Labor Day), May 2 (Good Friday—Greek Orthodox), May 5 (Easter Monday—Greek Orthodox), May 6 (Martyr's Day), May 8 (Ascension—Catholic), June 12 (Ascension—Orthodox), Aug. 15 (Assumption), Oct. 6 est. (Feast of Ramadan), Nov. 1 (All Saints), Nov. 22 (Independence Day), Dec. 13 est. (Feast of Al Adha), Dec. 25 (Christmas).

LESOTHO—Jan. 1 (New Year's), March 12 (Moshoeshoe's Day), March 28 (Good Friday), March 31 (Easter Monday), May 2 (King's Birthday), May 7 (Ascension), May 25 (Commonwealth Day), July 3 (Family Day), Aug. 4 (National Tree Planting Day), Oct. 4 (Independence Day), Oct. 6 (National Sports Day), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

LIBERIA—Jan. 1 (New Year's), Jan. 7 (Pioneer's Day), Feb. 11 (Armed Forces Day), March 12 (Decoration Day), March 15 (J. J. Robert's Birthday), April 11 (Fast and Prayer Day), May 14 (Unification Day), May 25 (African Liberation Day), July 26 (Independence Day), Aug. 24 (Flag Day), Nov. 6 (Thanksgiving Day), Nov. 29 (President William V. S. Tubman's Birthday), Dec. 1 (Matilda Newport Day), Dec. 25 (Christmas).

LIBYA—Jan. 13 (Muslim New Year), Jan. 22 afternoon, est. (Ashura), March 8 (Syrian National Day), March 25 est. (Prophet's Birthday), March 28 (Evacuation of British Forces Day), May 25 (African Day), June 11 (Evacuation of American Forces Day), July 23 (Egyptian National Day), Aug. 3 afternoon, est. (al-Isra wal-Mi'raj), Aug. 19 afternoon, est. (Nisf Shaban), Sept. 1 (Libyan National Day), Oct. 5-7 est. (Id al-Fitr), Oct. 7 (Evacuation of Italians Day), Dec. 13-16 est. (Id al-Adha)

LUXEMBOURG—Jan. 1 (New Year's), Feb. 10 (Shrove Monday), March 31 (Easter Monday), May 1 (Labor Day), May 8 (Ascension), May 19 (Whit Monday), June 23 (Grand Duke's Birthday), Aug. 15 (Assumption), Sept. 1 (Fall Fair "Schobermess"), Nov. 1 (All Saints), Nov. 2 (All Souls), Dec. 25-26 (Christmas).

MALAWI—Jan. 1 (New Year's), March 3 Martyr's Day), March 28 (Good Friday), March 31 (Easter Monday), May 14 (Kamuzu Day), July 5-7 (Republic Celebrations), Aug. 4 (Bank Holiday), Oct. 17 Mothers' Day), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

MALAYSIA—Jan. 1 (New Year's), Jan. 14 (First Day of Muharam), Feb. 11-12 (Chinese New Year), March 25 (Birthday of Prophet Mohamad), June 4 (Birthday of H.M. the Yang di-Pertuan Agong), Aug. 31 (National Day), Oct. 6-7 est. (Hari Raya Puasha), Dec. 13 (Hari Raya Haji), Dec. 25 (Christmas).

Regional holidays: Jan. 27 (Thaipusam), Penang; Feb. 1 (Federal Territory Day), Federal Territory; March 8 (Birthday of H.R.H. the Sultan of Selangor), Selangor; March 28 (Good Friday), Sabah and Sarawak; March 29 (Easter Saturday), Sabah and Sarawak; March 31 (Easter Monday), Sabah and Sarawak; May 1 (Labor Day), West Malaysia and Sarawak; May 10 and 12 (Harvest Festival), Sabah; May 25 (Wesak Day), West Malaysia; June 1-2

(Dayak Festival Day), Sarawak; July 1 (Birthday of H.E. the Governor of Sarawak), Sarawak; Nov. 2 (Deepavali), West Malaysia; Dec. 26 (Boxing Day), Sabah and Sarawak.

MALI—Jan. 1 (New Year's), Jan. 20 (Holiday of National Army), March 30 (Easter), May 1 (Labor Day), May 25 (Day of Africa), Sept. 22 (Independence Day), Nov. 19 (Liberation Day), Dec. 25 (Christmas).

In addition, the following Muslim holidays, subject to lunar variations, are observed: Two days of Mawloud (Birth and Baptism), Day of Ramadan, and Day of Tabaski.

MALTA—Jan. 1 (New Year's), Jan. 6 (Epiphany), Feb. 10 (St. Paul's Shipwreck), March 19 (St. Joseph), March 28 (Good Friday), May 1 (St. Joseph the Worker), May 8 (Ascension), May 29 (Corpus Christi), June 29 (Sts. Peter and Paul), Aug. 15 (Assumption), Sept. 8 (National Day), Nov. 1 (All Saints), Dec. 8 (Immaculate Conception), Dec. 25 (Christmas).

MAURITANIA—Jan. 1 (New Year's), Mid-March est. (Id el Maouloud), May 1 (Labor Day), May 25 (Organization of African Unity Day), early Oct. est. (Id el Fitr), Nov. 28 (Independence Day), mid-Dec. est. (Id el Adha).

MAURITIUS—Jan. 1-2 (New Year's), March 12 (Independence Day), March 31 (Easter Monday), May 1 (Labor Day), Aug. 15 (Assumption), Oct. 24 (U.N. Day), Nov. 1 (All Saints), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

A large number of holidays occur at different dates each year; the official list is not yet available. These holidays in order of occurrence include Id-El-Adha, Chinese Spring Festival, Cavadee, Maha Shivaratree, Holi, Divali, Yaum-Un-Nabi, Varusha Piruppu, Ganesh Chatturthi, Mid-Autumn Festival, Ild-El-Fitr, Divali, Ganga Asnam.

MEXICO—Jan. 1 (New Year's), Feb. 5 (Anniversary of Mexican Constitution), March 21 (Juarez' Birthday), March 28 (Good Friday), May 1 (Labor Day), May 5 (Anniversary of The Battle of Puebla), Sept. 16 (Anniversary of Proclamation of Mexican Independence), Oct. 12 (Race Day and Columbus Day), Nov. 2 (All Souls), Nov. 20 (Anniversary of Mexican Revolution), Dec. 25 (Christmas).

MONACO—Jan. 1 (New Year's), Jan. 27 (Sainte Devote), March 31 (Easter Monday), May 1 (Labor Day), May 8 (Ascension), May 19 (Whit Monday), June 13 (Fete Dieu), Aug. 15 (Assumption), Nov. 1 (All Saints), Nov. 19 (Prince Celebration Day), Dec. 7 (Holy Virgin Day), Dec. 25 (Christmas).

MOROCCO—Jan. 1 (New Year's), Jan. 13 est. (Moslem New Year), March 3 (Throne Day), March 27 est. (Mouloud), May 1 (Labor Day), Oct. 6 est. (Aid El Fitr), Nov. 18 (Independence Day), Dec. 13 est. (Aid El Kebir).

During the Moslem month of Ramadan, approximately Sept. 7 to Oct. 7, banks are open from 9:30 a.m. to 2 p.m. and Moroccan Government offices from 9 a.m. to 2 p.m.

Some private firms, excluding banks and insurance companies, and persons of the Christian and Jewish faith, observe the following religious holidays: March 27 (Passover), March 31 (Easter Monday), May 8 (Ascension), May 19 (Whit Monday), Aug. 15 (Assumption), Sept. 6 (Rosh Hashana), Sept. 15 (Yom Kippur), Nov. 1 (All Saints), Dec. 25 (Christmas).

MOZAMBIQUE—Jan. 1 (New Year's), June 10* (Day of Portugal), June 25 (Independence Day), movable date* (Corpus Christi), July 24 (Lourenco Marques City Day), Aug. 15 (Assumption), Aug. 20 (Beira City Day), Sept. 16 (Nacala City Day), Sept. 25* (Frelimo Day), Oct. 5* (Portuguese Republic Day), Nov. 1* (All Saints), Dec. 1* (Independence Restoration Day), Dec. 8* (Immaculate Conception), Dec. 25 (Christmas). *Tentative dates, subject to government action.

FOR MEXICAN CHILDREN—*This holiday display in a Mexican department store features dolls that many American youngsters would love to find under their Christmas tree.*

NEPAL—Jan. 29 half-day (Martyrs' Day), Feb. 16 (Basant Panchami), Feb. 19 (Tribhuvan Jayanti and Democracy Day), March 11 (Shivaratri), March 26 (Fagu), April 14 (New Year's Day), April 20 (Ram Nawami), May 25 (Buddha Jayanti), Aug. 21 (Janai Purnima), Aug. 29 (Krishna Jayanti), Sept. 8—for women only (Tij), Oct. 6 (Ghatasthapana), Oct. 12-19 (Dasain Festival), Oct. 24 half-day (U.N. Day), Nov. 3-5 (Tihar Festival), Dec. 16 (Mahendra Jayanti and Constitution Day), Dec. 29 (King Birendra's Birthday).

Regional holidays: April 11 (Ghode Jatra), Kathmandu Valley; Aug. 22 (Gai Jatra), Kathmandu Valley; Sept. 19 (Indra Jatra), Kathmandu Valley.

All dates after April 14 should be considered tentative until early April when the Government of Nepal publishes its official list of holidays.

NETHERLANDS—Jan. 1 (New Year's), March 28 (Good Friday), March 31 (Easter Monday), April 30 (Queen's Birthday), May 5 (30th Anniversary of Liberation Day), May 8 (Ascension), May 19 (Whit Monday), July 12-26 (Summer Holiday for Building Industry), Dec. 5 afternoon (St. Nicholas Eve), Dec. 25-26 (Christmas).

NETHERLANDS ANTILLES—Jan. 1 (New Year's), March 28 (Good Friday), March 31 (Easter Monday), April 30 (Queen Juliana's Birthday), May 1 (Labor Day), May 8 (Ascension), May 19 (Whit Monday), Dec. 15 (Statute Day), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

NEW CALEDONIA—Jan. 1 (New Year's), March 30-31 (Easter), May 1 (Labor Day), May 18-19 (Pentecost), July 14 (National Holiday), Aug. 15 (Assumption), Sept. 24 (New Caledonian Holiday), Nov. 1 (All Saints), Nov. 11 (Armistice Day), Dec. 25 (Christmas).

NEW ZEALAND—Jan. 1-2 (New Year's), Feb. 6 (New Zealand Day), March 28 Good Friday), March 31 (Easter Monday), April 25 (ANZAC Day), June 2 (Queen's Birthday), Oct. 27 (Labor Day), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

Regional holidays: Jan. 20 (Wellington Anniversary Day), Wellington; Jan. 27 (Auckland Anniversary Day), Auckland; Dec. 16 (Canterbury Anniversary Day), Christchurch.

NICARAGUA—Jan. 1 (New Year's), March 27 (Holy Thursday), March 28 (Good Friday), May 1 (Labor Day), July 14 (Day of National Dignity), Sept. 14 (Battle of San Jacinto), Sept. 15 (Independence Day), Oct. 12 (Columbus Day), Dec. 25 (Christmas).

Regional holidays: Aug. 1 and Aug. 10 are Managua local holidays (Patron Saint) from noon on.

Unofficial but generally observed holidays are May 27 (Army Day) and Nov. 2 afternoon (All Souls).

NIGER—Jan. 1 (New Year's), first week of Jan. est. (Tabaski), last week of March est. (Mouloud), March 31 (Easter Monday), May 1 (Labor Day), Aug. 3 (Independence Day), fourth week of Oct. est. (Korite), Dec. 18 (Republic Day), Dec. 25 (Christmas).

NIGERIA—Jan. 1 (New Year's), March 24 (Ed-el-Maulud), March 28 (Good Friday), March 31 (Easter Monday), Oct. 1 (National Day), Oct. 6-7 (Ed-el-Fitri), Dec. 13-15 (Ed-el-Kabir), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

NORWAY—Jan. 1 (New Year's), March 27-31 (Easter), May 1 (Labor Day), May 8 (Ascension), May 17 (Constitution Day), May 19 (Whit Monday), Dec. 25-26 (Christmas).

OMAN—Jan. 13 est. (Islamic New Year), Feb. 20 est. (Birthday of the Prophet), Aug. 6 est. (Ascension of the Prophet), Oct. 5-7 est. (Eid al Fitr), Nov. 18-19

(National Day), Dec. 10-13 est. (Eid al Adha).

PAKISTAN—Jan. 23 est. (Muharram), March 24 (Pakistan Day), March 26 est. (Milad-un-Nabi), May 1 (May Day), Aug. 14 (Independence Day), Sept. 6 (Defense of Pakistan Day), Sept. 11 (Death Anniversary of Quaid-i-Azam), Oct. 3 (Jumatul Wida), Oct. 7-8 (Eid-ul-Fitr), Dec. 14-15 (Eid-ul-Azha), Dec. 25 (Birthday of Quaid-i-Azam).

PANAMA—Jan. 1 (New Year's), Jan. 9 (Day of Mourning), Feb. 11 (Mardi Gras), March 28 (Good Friday), May 1 (Labor Day), Oct. 11 (Revolution Day), Nov. 3 (Independence Day), Nov. 28 (Independence from Spain), Dec. 8 (Mother's Day), Dec. 25 (Christmas).

Most stores and offices close from Feb. 8-10, the days preceding Mardi Gras Day.

Regional holidays: Aug. 15 (Panama City Anniversary), Panama City; Nov. 5 (City of Colon Day), City of Colon.

PARAGUAY—Jan. 1 (New Year's), Feb. 3 (St. Blas Day), March 1 (Heroes' Day), March 27 (Holy Thursday), March 28 (Good Friday), May 1 (Labor Day), May 14-15 (Independence Day), June 12 (Peace of Chaco, Corpus Christi), Aug. 15 (Founding of Asuncion), Sept. 29 (Victory of Boqueron), Oct. 12 (Columbus Day), Nov. 1 (All Saints), Dec. 8 (Our Lady of Caacupe), Dec. 25 (Christmas).

PERU—Jan. 1 (New Year's), March 27 half day (Holy Thursday), March 28 (Good Friday), May 1 (Labor Day), June 29 (Sts. Peter and Paul), July 28-29 (Independence Day), Aug. 30 (Santa Rosa de Lima), Oct. 9 (National Day of Dignity), Nov. 1 (All Saints), Dec. 8 (Immaculate Conception), Dec. 25 (Christmas).

PHILIPPINES—Jan. 1 (New Year's), March 27 (Maundy Thursday), March 28 (Good Friday), April 9 (Bataan Day), May 1 (Labor Day), June 12 (Independence Day), July 4 (Philippine-American Friendship Day), Dec. 1 (Bonifacio Day), Dec. 25 (Christmas), Dec. 30 (Rizal Day).

Regional holiday: June 24 (Manila Day), Manila only.

POLAND—Jan. 1 (New Year's), March 31 (Easter Monday), May 1 (Workers' Day), May 9 (Victory Day), May 29 (Corpus Christi), July 22 (National Day), Nov. 1 (All Saints), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

Twelve non-working Saturdays, in addition to All Saints Day, are to be scheduled in 1975.

PORTUGAL—Jan. 1 (New Year's), Feb. 11 (Carnival), March 28 afternoon (Good Friday)—government employees, March 29 (Holy Saturday)—government employees, May 1 (Labor Day), May 29 (Corpus Christi), June 10 (Portugal Day), Aug. 15 (Assumption), Oct. 5 (Proclamation of the Portuguese Republic), Nov. 1 (All Saints), Dec. 1 (Restoration of Portuguese Independence), Dec. 8 (Feast of the Immaculate Conception), Dec. 24 (Christmas Eve)—government employees, Dec. 25 (Christmas).

Regional holidays: June 13 (St. Anthony's Day), Lisbon; June 24 (St. John's Day), City of Oporto.

ROMANIA—Jan. 1-2 (New Year's), May 1-2 (Labor Day), Aug. 23-24 (National Day).

RWANDA—Jan. 1 (New Year's), March 30 (Easter Monday), May 1 (Labor Day), May 8 (Ascension Day), May 18 (Pentecost), July 1 (National Day), July 5 (Day of Peace and National Unity), Sept. 25 (Referendum Day), Oct. 26 (Armed Forces Day), Nov. 1 (All Saints), Dec. 25 (Christmas).

SAUDI ARABIA—Oct. 2-7 est. (Id al-Fitr), Dec. 8-18 est. (Id al-Adha).

Business and government activity is greatly reduced during the month of Ramadan (Sept. 6-Oct. 5) and the pilgrimage season (Dec.-Jan.).

SENEGAL—Jan. 1 (New Year's), March 26 est. (Mawloud), March 31 (Easter Monday), April 4 (Independence Day), May 1 (Labor Day), May 8 (Ascension), May 19 (Whit Monday), Aug. 15 (Assumption), Oct. 7 est. (Korite), Nov. 1 (All Saints), Dec. 15 est. (Tabaski), Dec. 25 (Christmas).

SIERRA LEONE—Jan. 1 (New Year's), Jan. 3 est. (Eid ul Adha), April 4 est. (Moulid un Nabi), March 28 (Good Friday), March 31 (Easter Monday), April 19 (Republic Day), Oct. 16 est. (Eid ul Fitri), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

SINGAPORE—Jan. 1 (New Year's), Feb. 11-12 (Chinese New Year), March 28 (Good Friday), May 1 (Labor Day), May 25—observed 26th (Vesak Day), Aug. 9 (National Day), Oct. 6 est. (Hari Raya Puasa), Nov. 2—observed 3rd (Deepavali), Dec. 13 est. (Hari Raya Haji), Dec. 25 (Christmas).

SOMALIA—March 14 est. (Prophet's Birthday), May 1 (Labor Day), July 1 (Independence Day), Oct. 5-6 est. (Idd-el-Fiter), Oct. 21-22 (Revolution Day), Dec. 13-14 est. (Idd-el-Adha).

Regional holiday: June 26 (Independence Day), Northern Region.

SOUTH AFRICA—Jan. 1 (New Year's), March 28 (Good Friday), March 31 (Easter Monday), May 8 (Ascension), May 31 (Republic Day), Aug. 14 (Public Holiday), Sept. 1 (Settlers' Day), Oct. 10 (Kruger Day), Dec. 16 (Day of the Covenant), Dec. 25 (Christmas), Dec. 26 (Boxing Day/Family Day).

SPAIN—Jan. 1 (New Year's), Jan. 6 (Epiphany), March 19 (St. Joseph), March 27 (Holy Thursday), March 28 (Good Friday), May 1 (Labor Day), May 8 (Ascension Thursday), May 29 (Corpus Christi), July 18 (National Uprising), July 25 (Santiago), Aug. 15 (Assumption), Nov. 1 (All Saints), Dec. 8 (Immaculate Conception), Dec. 25 (Christmas).

Regional holidays: March 31 (Easter Monday), Barcelona; May 15 (San Isidro), Madrid; June 19 (Liberation Day), Bilbao; June 24 (St. John the Baptist), Barcelona; July 31 (St. Ignatius), Bilbao; Sept. 24 (Our Lady of Mercy), Barcelona; Oct. 1 (Day of the Caudillo), government offices.

SRI LANKA—Jan. 14 (Tamil Thai Pongal Day), Jan. 27 (Poya), Feb. 25 (Poya), March 26 (Poya and Holy Prophet's Birthday), April 14 (Sinhala and Tamil New Year's Day), April 25 (Poya), May 22 (Republic Day), May 24 (Poya), June 23 (Poya), July 22 (Poya), Aug. 21 (Poya), Sept. 19 (Poya), Sept. 26 (Bandaranike Commemoration Day), Oct. 7 (Id-Ul-Fitr), Oct. 19 (Poya), Nov. 18 (Poya), Dec. 18 (Poya), Dec. 25 (Christmas).

SUDAN—Jan. 1 (Independence Day), Jan.

SAPPORO SNOW FESTIVAL—*Although not an official commercial holiday, the snow festival held each February in Sapporo, Japan is a popular event which attracts tens of thousands of visitors. The wide main thoroughfare of the city is filled with snow and ice sculptures.*

13 est. (New Year), March 3 (Southern Accord Anniversary), March 26 est. (Muhammed's Birthday), April 21 est. (Sham al-Naseem), May 25 (Anniversary May Revolution), Oct. 6-9 est. (Ramadan Bairam), Oct. 12 (Inauguration Day), Dec. 14-18 est. (Kurban Bairam), Dec. 25 (Christmas).

SURINAM—Jan. 1 (New Year's), March 28 est. (Holi Phagwa), March 28 (Good Friday), April 1 (Easter Monday), April 30 (Queen's Birthday), May 1 (Labor Day), July 1 (Emancipation Day), Oct. 7 est. (Id Ul Fitre), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

SWAZILAND—Jan. 1 (New Year's), March 28 (Good Friday), March 31 (Easter Monday), April 25 (National Flag Day), May 8 (Ascension), June 12 (Commonwealth Day), July 22 (King's Birthday), Last week of August, to be announced (Umhlanga), Sept. 6 (Independence Day), Oct. 24 (U.N. Day), Dec. 25 (Christmas), Dec. 26 (Boxing Day), December or January (Incwala Ceremony).

SWEDEN—Jan. 1 (New Year's), Jan. 6 (13th Day of Christmas), March 28 (Good Friday), March 31 (Easter Monday), May 1 (Labor Day), May 8 (Ascension), May 19 (Whit Monday), June 20-21 (Midsummer Day), Nov. 1 (All Saints), Dec. 25-26 (Christmas).

SWITZERLAND—Jan. 1 (New Year's), Jan. 2 (Baerzelistag), March 28 (Good Friday), March 31 (Easter Monday), May 19 (Whit Monday), Aug. 1 (National Day), Dec. 24 half day (Christmas Eve), Dec. 25 (Christmas), Dec. 26 (St. Stephen's Day).

Regional holidays: Thirty other holidays are observed locally, of which the following are noteworthy for major business centers: Feb. 17-19 (Carnival), Basel; April 21 (Sechselauten), Zurich; May 1 afternoon (Labor Day), major cities; Sept. 4 (Thanksgiving), Geneva; Sept. 8 (Knabenschiessen), Zurich; Dec. 31 (Restoration Day), Geneva.

SYRIA—Jan. 1 (New Year's), Jan. 13 est. (Al-Hijra), March 8 (Revolution Day), March 24 (Prophet's Birthday), April 14 (Easter—Latin), April 17 (Evacuation Day), April 21 (Easter—Orthodox), July 23 (Revolution Day—Egyptian), Sept. 1 (Union of Arab Republics Day), Oct. 6-8 est. (Id al-Fitr), Dec. 13-16 est. (Id al-Adha), Dec. 25 (Christmas).

TAIWAN—Jan. 1 (New Year's and Founding of the Republic of China), Jan. 2 (New Year's), Feb. 10 half day (Chinese New Year's Eve), Feb. 11-12 (Chinese New Year), March 29 (Youth Day), April 5 (Tomb-sweeping Day), June 14 afternoon (Dragon Boat Festival), Sept. 20 (Moon Festival), Sept. 28 (Confucius' Birthday), Oct. 10 (Double Ten Day), Oct. 25 (Taiwan Retrocession Day), Nov. 11 (Dr. Sun Yat Sen's Birthday), Dec. 25 (Constitution Day).

TANZANIA—Jan. 12 (Zanzibar Revolution Day), Feb. 5 (Birthday of Zanzibar Afro Shirazi Party), March 25 est. (Maulid Day), March 28 (Good Friday), March 31 (Easter Monday), April 26 (Union Day), May 1 (International Workers' Day), July 7 (Saba Saba Day), Oct. 6-7 est. (Idd-El-Fitr), Dec. 9 (Independence/Republic Day), Dec. 14 est. (Idd-El-Jah), Dec. 25 (Christmas).

THAILAND—Jan. 1 (New Year's), Feb. 11* (Chinese New Year's Day), Feb. 25 (Makha Bucha Day), April 6 (Chakri Day), April 13 (Songkran Day), May 1* (Labor Day), May 5 (Coronation Day), May 25 (Wisakha Bucha Day), July 23 (Asalaha Bucha Day), July 24 (Buddhist Lent), Aug. 12 (Queen's Birthday), Oct. 23 (Chulalongkorn Day), Dec. 5 (King's Birthday), Dec. 10 (Constitution Day), Dec. 25* (Christmas), Dec. 31 (New Year's Eve). * Only commercial firms and banks closed.

TOGO—Jan. 1 (New Year's), Jan. 13 (National Liberation Day), March 31 (Easter Monday), April 27 (Independence Day), May 1 (Labor Day), May 8 (Ascension Thursday), May 19 (Whit Monday), Aug. 15 (Feast of Assumption), Nov. 1 (All Saints), Dec. 25 (Christmas).

TONGA—Jan. 1 (New Year's), March 28-31 (Easter holidays), April 25 (ANZAC Day), May 4 (Crown Prince's Birthday), June 4 (Emancipation Day), July 4 (His Majesty's Birthday), Nov. 4 (Constitution Day), Dec. 4 (King Tupou I Birthday), Dec. 21-Jan. 2 (Christmas holidays).

TRINIDAD AND TOBAGO—Jan. 1 (New Year's), March 28 (Good Friday), March 31 (Easter Monday), May 19 (Whit Monday), May 29 (Corpus Christi), June 19 (Labor Day), Aug. 4 (Caribbean Day), Aug. 31 (Independence Day), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

Divali, a Hindu holiday, occurs some time in Oct.-Nov., and Eid-ul-Fitr, a Muslim holiday, may fall between Oct. and March; these are determined by lunar phases and are announced shortly before they occur. Feb. 10-11 (Carnival) is observed with minimum of commercial activity.

TUNISIA—Jan. 1 (New Year's), Jan. 13 est. (Ras El Am El Hijri), Jan. 18 (Remembrance Day), March 20 (Independence Day), March 25 est. (Mouled), April 9 (Martyr's Day), May 1 (Labor Day), June 1-2 (Victory Day), July 25 (Republic Day), Aug. 3 (President's Birthday), Aug. 13 (Women's Day), Sept. 3 (Commemoration of Sept. 3, 1934), Oct. 6 est. (Aid Seghir), Oct. 15 (Evacuation of Bizerte), Dec. 13 est. (Aid El Kebir).

TURKEY—Jan. 1 (New Year's), April 23 (National Sovereignty and Children's Day), May 1 (Spring Day), May 19 (Youth and Sports Day), May 26 afternoon-May 28 (Freedom and Constitution Day), Oct. 7-9 (The Feast of Sugar), Oct. 28 afternoon-Oct. 30 (Independence Day), Dec. 15-16 (The Feast of Sacrifice).

UNITED ARAB EMIRATES—Jan. 1 (New Year's), Jan. 15 est. (Islamic New Year), March 24 est. (Prophet's Birthday), Aug. 4 est. (Ascension), Aug. 6 (Accession Day), Oct. 5-7 est. (Eid al-Fitr), Dec. 2 (UAE National Day), Dec. 13 est. (Waqfa), Dec. 14-17 est. (Eid al-Adha).

Where a Friday falls within the projected holiday period, an additional day, either before or after the period stated, is normally added.

Although Christmas is not an official holiday, some businesses are closed.

UNITED KINGDOM—Jan. 1 (New Year's), March 28 (Good Friday), March 30-31 (Easter), Dec. 25 (Christmas).

Regional holidays: Jan. 2 (Bank Holiday), Scotland; March 17 (St. Patrick's Day), N. Ireland; May 5 (Bank Holiday), Scotland; May 9 (Liberation Day), Channel Islands; May 26 (Spring Bank Holiday), U.K., excluding Scotland, including Channel Islands; July 12 (Bank Holiday), N. Ireland; Aug. 4 (Bank Holiday), Scotland; Aug. 25 (Late Summer Holiday), U.K., excluding Scotland, including Channel Islands; Dec. 26 (Boxing Day), U.K., excluding Scotland, including Channel Islands.

UPPER VOLTA—Jan. 1 (New Year's), Jan. 3 (Revolution Day), March 25 est. (Maouloud), March 31 (Easter Monday), May 1 (Labor Day), May 8 (Ascension Thursday), May 19 (Whit Monday), Aug. 15 (Assumption), Oct. 7 est. (Ramadan), Nov. 1 (All Saints), Dec. 11 (National Day), Dec. 14 est. (Tabaski), Dec. 25 (Christmas).

The government sometimes declares ad hoc commercial holidays in conjunction with special events.

URUGUAY—Jan. 1 (New Year's), Jan. 6 (Epiphany), Feb. 10-11 (Carnival—some businesses may close for 10-day period from Monday through following Thursday noon), March 27-28 (Holy Week—some businesses may close for 10-day period from Monday through following Thursday noon), May 1 (Labor Day), May 18 (Battle of Las Piedras), June 19 (Artigas' Birthday), July 18 (Constitution Day), Aug. 25 (Independence Day), Oct. 12 (Columbus Day), Nov. 2 (All Souls), Dec. 8 (Day of the Beaches), Dec. 25 (Christmas).

U.S.S R.—Jan. 1 (New Year's), March 8 (Women's Day), May 1-2 (May Day), May 9 (Victory Day), Nov. 7-8 (October Revolution), Dec. 5 (Constitution Day).

VENEZUELA—Jan. 1 (New Year's), Jan. 6 (Epiphany), Feb. 10-11 (Carnival), March 19—observed March 24 (St. Joseph's Day), March 27 (Maundy Thursday), March 28 (Good Friday), March 29 (Resurrection Saturday), April 19 (Declaration of Independence), May 1 (Labor Day), May 8—observed May 12 (Ascension), May 29—observed June 2 (Corpus Christi), June 24 (Battle of Carabobo), June 29 (Sts. Peter and Paul), July 5 (Independence Day), July 24 (Bolivar's Birthday), Aug. 15 (Assumption), Oct. 12 (Columbus Day), Nov. 1 (All Saints), Dec. 8 (Immaculate Conception), Dec. 24 afternoon (Christmas Eve), Dec. 25 (Christmas), Dec. 31 afternoon (New Year's Eve).

Regional holidays: Feb. 3 (Sucre's Birthday), Cumana; March 10 (Vargas Day), La Guaira; Oct. 24 (Urdaneta's Birthday), Maracaibo; Nov. 18 (Virgin of Chiquinquira), Maracaibo.

VIET-NAM—Jan. 1 (New Year's), Jan. 19 (Buddha's Illumination Day), Feb. 10-13 (Tet—Lunar New Year), March 30 (Easter), April 21 (Anniversary of King Hung Vuong's Birthday), May 1 (Labor Day), May 25 (Buddha's Birthday), Nov. 1 (National Day), Dec. 25 (Christmas).

YEMEN—Jan. 13 est. (Muslim New Year), March 23 est. (Prophet's Birthday), Sept. 25-27 (Revolution Day), Oct. 5-7 est. (Id al-Fitr), Nov. 5 (National Day), Dec. 12-14 est. (Id al-Adha).

Many commercial activities are greatly reduced during Ramadan, tentatively Sept. 6 to Oct. 4.

YUGOSLAVIA—Jan. 1-2 (New Year's), May 1-2 (May Day), July 4 (Fighter's Day), Nov. 29-30 (Day of the Republic).

Regional Holidays: July 7 (Uprising Day), Serbia; July 22 (Uprising Day), Slovenia; July 27 (Uprising Day), Croatia, Bosnia & Herz; Aug. 2 (Uprising of 1903), Macedonia; Oct. 11 (Uprising Day), Macedonia; Nov. 1 (Day of the Dead), Slovenia.

ZAIRE—Jan. 1 (New Year's), Jan. 4 (Martyrs of Independence), May 1 (Labor Day), May 20 (MPR Day), June 24 (Proclamation of Constitution Day), June 30 (Independence Day), Oct. 27 (Anniversary of Changing Name of Country to Republic of Zaire), Nov. 17 (Armed Forces Day), Nov. 24 (Anniversary of New Regime).

ZAMBIA—Jan. 1 (New Year's), March 28-31 (Easter), May 1 (Labor Day), May 19 (Whit Monday), May 26 (African Freedom Day), July 7 (Heroes' Day), July 8 (Unity Day), Aug. 11 (Youth Day), Oct. 24 (Independence Day), Dec. 25 (Christmas), Dec. 26 (Boxing Day).

Worldwide Business Opportunities

International trade specialists in the Department of Commerce and Foreign Service Officers in the U.S. Embassies and Consulates around the world are continually developing specific commercial opportunities through which American companies can find buyers, agents, partners or investors abroad. One of the major means for communicating these opportunities promptly and accurately to the U.S. business community is through the columns of this magazine.

The section that follows presents details about licensing and joint venture proposals, opportunities to sell to foreign enterprises and appoint agents, and details on major construction and expansion projects.

Licensing, Investment Abroad

0112, 0115 — TANZANIA — Government seeks U.S. joint venture or management arrangements to produce **rice and corn.** Farmland in southwest near recently completed Tanzam highway is available for the projects. Rice would be produced on about 30,000 acres, and up to 50,000 acres is available for corn production. Government would assume a minority equity position in projects of up to 50 percent. Government would like to get ventures under way by late 1975. Additional information available from Foreign Investment Services Staff, Room 4021, U.S. Department of Commerce, Washington, D.C. 20230. P-74732. OPIC.

2000—BOLIVIA—U.S. joint venture partner is sought to manufacture and package following products: **yogurt, butter, margarine, ice cream, orange and other juices, whole milk, recombined sweetened condensed milk, evaporated milk.** Firm is a Canada Dry franchise dealer. A new company would be formed to produce above products. Except for whole milk, imported milk will be used as base for dairy products. Juices will be produced from imported dehydrated powders. Output will be from 200 to 300 tins per minute for condensed and evaporated milk. Foreign Investment Services Staff, Room 4021, U.S. Department of Commerce, Washington, D.C. 20230. P-74730. OPIC.

2411—MEXICO — Prominent businessman seeks U.S. partner to **cut and market about 600 pine trees** on his land southwest of Puerto Vallarta. Sought of a U.S. investor is about $40,000 to purchase bulldozer and logging equipment. Mexican entrepreneur has received government approval to proceed with project. He is also interested in investigating livestock and tourism possibilities on his ranch. Ramon Gonzalez-Velasco, Director of Chamber of Commerce of Puerto Vallarta, Libertad No. 20, Aptdo. Postal 234, Puerto Vallarta, Jalisco, Mexico. P-74717.

2869—FRANCE—Seeks joint venture, licensing and other collaborative agreements with U.S. firms in **organic chemicals.** Company is large manufacturer and importer of fertilizers, nitrogen, nitric acid, catalysts, liquefied refinery gases, and minerals. Established in 1919, employs 920, has annual sales volume of $60 million. Jacques Quibel, Director, Research and Development, Societe Chiminque de la Grande Paroisse, 9 Ave. Robert Schuman, 75007, France. Cable, GRANDPARC-Paris; telex, 27.779F AIRLIQ; telephone; 705.92.80. P-74729. Mr. Quibel plans to be in New York City Jan. 27—Feb. 8, at Algonquin Hotel (telephone: 212 MU-7-4400) and has reserved afternoon of Jan. 30 to meet with interested businessmen.

3079, 3585—BRAZIL—Seeks joint venture or licensing agreements to manufacture **plastic construction materials** including doors and windows for housing and partitions and **modular space dividers** for offices, factories and schools. Especially interested in corrosion resistant materials of fiberglass reinforced polyester that are soundproof and fireproof. Also seeks technology to produce **plastic air coolers for closed circuit cooling.** Also interested in technology for manufacturing **systems and equipment using solar energy for air conditioning.** Medium sized firm with 120 employees, established in 1949. R. Freitas, CIPALDI, Engenharia Industria e Comercio S.A., Av. Brasil, 1976, 20000 Rio de Janeiro, GB, Brazil. WTDR. P-74739. OPIC.

3273—ISRAEL—Firm interested in acquiring for one of its subsidiaries know-how for **manufacture of prestressed against mold concrete electric poles.** Horizontal force of poles: 750 kg.; height from 8 to 16 meters. Contact: Ilan Mendelsohn, Planning & Development Division, Koor Industries Ltd., Koor Bldg., 8 Shaul Mamelekh Ave., P.O. Box 33333, Tel Aviv, Israel. P-74737. OPIC.

3300—BRAZIL—Firm seeks U.S. know-how, technical assistance, machinery and investment for a joint venture to **expand its production of metalurgical products.** Company is medium-sized with a total of 55 employees. Jose Orlando Magalhaes, Director President, TEMIL S/A—Tecnica de Maquinas para Industria e Lavoura, Rua Alvares de Azevedo, 538 (Maria da Graca), 20.000 Rio de Janeiro, GB, Brazil. WTDR. P-74734. OPIC.

Quebec Seeking Investment

Quebec's Ministry of Industry and Commerce (MIC) recently launched a promotional campaign to attract new investors. According to the MIC, the province has identified 15 industries in secondary manufacturing as ideally suited for special development efforts.

To date, four studies have been released. The first two, *The Telecommunications/Computer Industry* and *The Mini-Tractors and Attachments Industry*, were completed earlier this year. The second two, *The Recording and Measuring Instruments Industry* and *The Disposable Surgical and Hospital Supplies Industry*, are now available on request. Studies on the other 11 industries will be released gradually over the next few months. The reports include detailed cost profit studies and describe incentives provided by the Quebec Industrial Development Corporation.

To backstop this program, the MIC will establish a data bank on each municipality in Quebec with information on such matters as population density, availability of labor, public services, tax rates, education facilities, climate, housing, communications and transport, commerce and finance, energy, manufacturing industries and availability of industry space. To obtain copies of these studies, U.S. businessmen should write Quebec Government House, 17 West 50th St., New York 10020.

3357—PAKISTAN—Plans to establish a facility to **manufacture telephone cable.** Prepared to consider turnkey operation, joint venture involving foreign equity or some type of technology agreement. Pakistani organization is flexible regarding specifications of cable. Mohammad Aslam, Deputy Director General (Planning), Pakistan Telegraph and Telephone Department, Islamabad, Pakistan. P-74718. OPIC.

3400, 3600, 3949—SWITZERLAND—Firm interested in manufacturing under license **industrial controls, small metal apparatus, compact heating products, heating and energy devices.** Firm also offers for manufacture under license and distribution in the U.S. cross country **ski binding and brake replacing safety straps.** Binding is patented in most skiing countries, including U.S. Company specializes in production of locks, building hardware, sheet metal work, industrial controls, unit air conditioners, home comfort appliances, oil burner regulators. Modern manufacturing facilities. Established 1857, employs 300. Otto Frey, Assistant Sales Manager, Glutz AG, Segetz Strasse 13, 4500 Solothurn, Switzerland. Telex, 34163; telephone, 065.2 38 76. P-74741.

3546—INDIA — Seeks license or similar agreement to manufacture **portable electric power tools.** Firm's interests include drills, grinders, sanders, planers and polishers. Initial cost of project is estimated at $700,000. U.S. partner would provide technical know-how and assistance in procurement of equipment. Indian company is one of oldest marketing and retail merchandising organizations, in the country. It also operates engineering, shipping, hotel and manufacturing divisions. Annual sales are around $40 million. J. R. Kochhar, Senior Executive (Projects), Spencer Co., Ltd., 19-A Alipore Road, Dehli 110006, India. WTDR. P-74742. OPIC.

3551—BRAZIL—A leading designer and manufacturer of equipment for **meat packing plants, slaughterhouses and refrigeration of prepared meats** seeks joint venture with U.S. firm in the same line of business. **Brazilian** company welcomes substantial participation in stock and management in return for capital and technology. It wants to expand its local and export market potential. Company has equipped about 100 meat plants in Brazil and exports to some neighboring countries. Firm is building a new facility outside of Sao Paulo; employs approximately 515. Jose Nelson Faria, Director of Finance and Administration, Hermann S.A. Ind. e Com., Rua Salvador Leme 326/344, 01124 Sao Paulo (SP), Brazil. WTDR. P-74738. OPIC.

3551—NETHERLANDS — Manufacturer of machinery for dairy and milk industry seeks license. Wants to **produce washing and sterilizing equipment, pasteurizers, homogenizers and ice cream freezers. Also, dry milk and butter and cheese processing machinery.** Firm employs 50; enjoys a favorable reputation. Product line includes milk and cream coolers, pasteurizers, and tanks. H. J. Hettema, Deputy Manager, B.V. Machinefabriek Friesland, 402 Zuidvliet, Leeuwarden, Netherlands. P-74719.

3551—NETHERLANDS — Manufacturer of machinery for milling industry seeks licenses to expand its product line. Wants to produce

flour and grain mill machinery; bakery equipment; sugar plant machinery including crushers, pulverizers, granulators and other equipment for cane and beet mills; meat and poultry processing machinery; oilseed crushing and extracting machinery; flour and grain mill packing and packaging apparatus; and commercial weighing machinery. Equipment would be marketed in Benelux, West Germany, Switzerland and Austria. Firm is subsidiary of British concern. It was established in 1901; employs 200. R. W. Mark, Managing Director, Simon-Heesen B.V., 46 van Salmstraat, Boxtel, Netherlands. P-74720.

3552—UNITED KINGDOM—Seeks license to manufacture **textile machinery computer controlled equipment.** Firm presently produces textile machinery control equipment including pattern control and punched tape and full electronics pattern control systems. It is part of large U.K. group engaged in variety of engineering and manufacturing activities. H. E. Mattox, Assistant Commercial Attache, U.S. Embassy, Grosvenor Square, London W.1., England. P-74736.

3553—CANADA—Firm seeks licensing arrangement for manufacture of **processing and/or production machines.** Company, a major designer and manufacturer of machinery for sawmill, plywood and other forest industries, plans to diversify its product lines. Employs 110 and operates three plants in Western Canada. Location provides ready accessibility to Vancouver International Airport and ports of Vancouver and New Westminster. G. E. Wilkes, Production Manager, Brunette Machine Works, Ltd., 150 East Columbia St., New Westminster, B.C. V3L 3W1, Canada. Telephone, 604-522-3977; telex, 04-351189; cable, BRUNETTE. P-74721.

3559—UNITED KINGDOM—Seeks licenses to manufacture newly **developed reverse air pulse filters, wet dust collectors and self contained dust extraction units.** Firm produces dust and fume extraction equipment and industrial ventilation apparatus. Company has tended to concentrate on design and manufacture of dust work side of business; has good connections with air pollution equipment manufacturers. Employs about 30. Ronald N. Watson, Managing Director, R. N. Watson Ltd., Oaklands House, Oaklands Drive, Sale M33 1NS, England. P-74722.

3561—NEW ZEALAND — Firm seek to manufacture under license **pumps for industrial use for liquids, water and chemicals, and for semi-solids or liquefied solids.** Firm will provide metal fabrication and machine turning while U.S. licensor would supply components and technical information. Company presently operating an engineering shop manufacturing to customer specifications. Manufacturers include metal working machinery, components for conversion of engines to marine use, and components for use in hydraulic systems on forklift trucks. R. J. Cockle, Managing Director, Turnco Engineering Ltd., 44 Grayson Ave., Papatoetoe, Auckland, New Zealand. (Postal address: P.O. Box 63-030, Papatoetoe South). Telephone, POP 86-300. WTDR. P-74724.

3579—UNITED KINGDOM—Small manufacturer of thyristor controlled speed drives and control systems seeks license or joint venture. Wants to produce and supply **electrical/electronic equipment to offshore oil industry.** Firm is capable of assembling complex electric/electronic control equipment and operates a follow up service organization. P. Allen Bennett, Chairman, Managing Director, Allen Bennett Ltd., Orgreave Road, Sheffield, S13 9LQ, Yorkshire, England. Telephone, Sheffield 693287. P-74723.

3585—UNITED KINGDOM—Seeks license to manufacture **air conditioning and air handling equipment, thermal fluid heat transfer equipment and electro/mechanical indication measurement and control apparatus for flow temperature and pressure.** Company presently makes pipeline equipment including tubes, fittings, flanges, valves, strainers, pneumatic control valves and pumps. It employs about 1,100 including 100 salesmen. J. H. Waters, Director of Group Marketing, British Steam Specialties Ltd., Fleet St., Leicester LE1 3QQ, England. P-74725.

3599—SAUDI ARABIA—Firm seeks joint venture partner to establish a factory for manufacturing **automobile oil filters.** Plant should have capacity to produce initially a half million filters per year of different sizes. American partner expected to provide machinery and equipment, technical know-how and technicians. Market potential for oil filters in Saudi Arabia is good. Automobile imports for 1972 and 1973 were approximately 29,000 and 36,000 respectively; expected to approach 45,000 this year. Two large automobile assembly plants to be established in 1976. The interested firm presently imports, wholesales and retails passenger cars, trucks, buses, automotive spare parts, household appliances. It has reported capital of $3 million and annual sales of $9 million. Mohamed A. Al-Hamrani, Partner/Manager, Al-Hamrani Trading Est., P.O. Box 1229, Jidda, Saudi Arabia. WTDR. P-74733.

3600—MOROCCO—Government is seeking foreign investors to develop electronics industry. Plants to produce all types of **electronic components and equipment** are of interest. Products will be for domestic market and for export, mainly to Europe. American investors would be welcome to undertake investment in new sectors of electronics field or to cooperate in expanding range of products already being produced in Morocco. Investors will benefit from incentives provided under new investment code. Large labor force is available. Additional information, including listing of electronic products currently produced in Morocco, is available from Foreign Investment Services Staff, Room 4021, U.S. Department of Commerce, Washington, D.C. 20230. P-74731. OPIC.

3661—UNITED KINGDOM—Seeks license to manufacture **high quality telephone amplification equipment.** Should be suitable for setting up at short notice group conferences over British Post Office Corporation telephone equipment now in use. Firm presently designs and produces variety of mechanical and electrical systems including signaling systems for British Rail, industrial control equipment and remote control devices. It is subsidiary of M. L. Holdings Ltd. G. D. Miller, International Director-Engineering, Electrical Division, M. L. Engineering (Plymouth) Ltd., Burrington Way, Plymouth, Devon PL5 3NB, England. Telephone, 0752-71226; cable, EMEL, Plymouth; telex, 45383. P-74726.

Licensing In U.S.

For additional information on these opportunities to manufacture foreign firms' products in the United States under a licensing agreement or in partnership, write the Investment Services Staff, Bureau of International Commerce, Room 4020, U.S. Department of Commerce, Washington, D.C. 20230 (202-967-2248) referring to the appropriate file number.

ARGENTINA—An Argentine corporation is seeking U.S. licensee to manufacture its product line, which includes flexible plastic toys, special adhesives for automotive filters, rubber mats, and rubber and vinyl household, surgical, and industrial gloves. **File 2650**

SWITZERLAND—A Swiss company is offering to license manufacture in the United States of its dry and plastic plaster concentrates for manual and mechanical application on walls, ceilings, and facades .Firm's system of coating materials is now marketed in several European countries under an internationally registered trademark. With this high-quality system and its savings in labor and costs, company secured 60 percent of Swiss market for stucco facades within five years. **File 2651**

SWITZERLAND—License to manufacture highly adaptable, fully automatic machines for production of expandable polystyrene moldings is being offered by a large Swiss manufacturer of industrial capital equipment and agricultural machinery. Current backlog of orders in Europe for equipment offered will make possible export sales for U.S. licensee. Swiss firm has sales and service facilities throughout most of Europe and represents several American companies. **File 2652**

YUGOSLAVIA—Large Yugoslav manufacturer of electrical equipment, process control equipment, and household appliances wishes to license production in the United States of its semi-automatic assemblers for high-voltage fuse links. The two-stage assembly process, based on simultaneous placing of sand filler and spiraling of formed fuse elements into insulating barrel, makes possible reduced assembly time and simplified, economic fuse link designs. **File 2653**

UNITED KINGDOM—British manufacturer of terrazzo and cement based floor tiles, conglomerate marble products, and industrial seamless flooring seeks a U.S. joint venture partner for this product line. Firm also has a large contracting division for tile laying in supermarkets, office blocks, new town center developments, and similar projects. In addition, it is now installing a new plant, said to be the first of its kind in the world, to produce a unique thin terrazzo tile. **File 2654**

Licensing and investment proposals from foreign firms are listed in these columns. Specific product interests in each proposal are highlighted in bold type to facilitate identification and each proposal is preceded by the appropriate four-digit product number taken from the Standard Industrial Classification (SIC) Manual.

Background information on opportunities abroad and assistance on overseas investments are available from the Foreign Investment Services Staff, U.S. Department of Commerce, Washington, D.C. 20230. "P" numbers should be used when responding to any of the specific proposals listed.

WTDR indicates that a World Traders Data Report containing financial and background information on the foreign firm is available for $15 from the Export Information Division, Room 1313, U.S. Department of Commerce, Washington, D.C. 20230, or from any Commerce District Office.

OPIC indicates that the country involved is eligible for investment insurance coverage and financing from the Overseas Private Investment Corporation. Information regarding applicable coverage may be obtained from OPIC, Washington, D.C. 20527.

Foreign Trade Inquiries

These trade opportunities are based on reports received from the U.S. Foreign Service—Department of State by the Trade Opportunities Division, Room 1322, U.S. Department of Commerce, Washington, D.C. 20230. The commodities in which foreign firms have interest are indicated by the five-digit numbers and commodity classifications which are from the Standard Industrial Classification (SIC) Manual and the Numerical List of Manufactured Products, 1972 Census of Manufactures.

U.S. firms should be aware that the listing in Commerce Today *of opportunities to trade in specific commodities and technical data does not necessarily imply approval of their export by the Department of Commerce pursuant to the Export Administration Act of 1969. Applicable export licensing regulations must be followed.*

Every effort is made to include only traders with good reputations. However, the Department cannot be responsible for any trade relations.

WTDR indicates that a World Traders Data Report on this specific firm is available at $15 from the Export Information Division, Room 1313, U.S. Department of Commerce, Washington, D.C. 20230. A WTDR is a trade profile which contains commercial information including financial references, on an individual foreign firm. Orders must include complete name and address of the subject firm and be accompanied by payment. Further information concerning WTDRs and request forms are available at each Commerce District Office.

The mark (•) indicates that this trade opportunity is a request for bids by a foreign government agency.

Direct Sales

Building construction

• **15100—LIBYA**—The National Industrialization Corporation of the Libyan Arab Republic invites specialized companies to bid for construction and execution of two fertilizer plants in Tripoli and Benghazi on a turn-key basis, according to specifications and general condition of agreements (Tender No. 25/74). Tender documents available upon payment of 150 Libyan dinars (US$515) from the National Industrialization Corporation, Sanaa St., P.O. Box 4388, Tripoli. Tenders, due by Jan. 16, must be accompanied by gurantee of equivalent of two percent of total value of bid.

•**15100—ALGERIA** — Prequalification of firms to tender for turnkey construction of plant to produce 63/65 percent phosphate from rock. Annual production capacity of plant will be 900,000 metric tons, location will be Djebel Onk phosphate mine in Wilaya de Tebessa, province in eastern Algeria. Tender offer will include complementary work for improvement of site, civil works and construction of related buildings. Project is to double capacity of a plant now processing this low grade phosphate. Equipment should be, in principle, identical to that already in use. Related technical literature and workshop available at the Djebel Onk mine for interested firms. Beginning of contract will be June 1, 1975, starting date approximately Sept. 1, 1976. Prequalification deadline is Feb. 1. For additional information, contact Division Engineering et Developement, SONAREM, 1, rue Hamed Idir, El-Harrach, Algiers, (cable address is Minebar Alger; telex number 52910). Offer and correspondence in French required. All specs metric terms.

• **15100—ALGERIA** — Tender for turnkey construction of ceramic dinnerware plant with annual capacity of 50,000 metric tons at Mila in eastern Algeria. Tender offers must be in six copies and in French and include a guarantee, technical assistance, and training of personnel and technicians. Offers must remain valid for six months past bid deadline. Commercial offer and technical offer must be submitted separately. Offers must be submitted by registered mail to: Direction Generale, Societe Nationale des Industries Chimiques, 4/6 Blvd. Mohamed V, Algiers (cable address is Snicent Alger: telex number 52840). Bid deadline Feb. 18. Correspondence must be in French, specifications metric terms.

• **15100—LIBYA** — The Ports and Lights Corp. of the Libyan Arab Republic Government invites contractors to prequalify to bid on construction of a four kilometer breakwater, an extension to the existing Tripoli harbor. Interested firms should send official letters requesting contract briefing documents before Jan. 15. Request must contain complete data and financial status of firms. Send to Ports and Lights Corp., P.O. Box 648, Damascus St., Tripoli, Libyan Arab Republic. Ports and Lights Corp. will send invitations to chosen companies asking them to bid by Feb. 25. Tender documents and specifications will be on sale for those firms after March 15. Deadline to bid will be June 15.

• **15100—PARAGUAY** — Government of Paraguay invites prequalification by contracting firms or consortia of such firms for construction of agricultural experimental facility and other agricultural schools, and construction of cement silos, warehouses and ancillary installations. These projects will be financed by Government of Paraguay with assistance of Inter-American Development Bank (IDB) in accord with loan numbers 295/SF-PR and 2/AF-PR. Prequalification open to Paraguayan contractors and contractors of IDB member countries except Canada. Overall project estimated at $1.2 million and includes: 1) completion of construction at Agricultural School of Concepcion (2,500 sq. meters), 2) expansion and remodeling of existing facilities of the Carlos Pfannl Institute at Coronel Oviedo (4,800 sq. meters), 3) construction of agricultural school at Puerto Presidente Stroessner, (4,000 sq. meters), 4) rural construction associated with the agricultural schools of Caazapa and Puerto Presidente Stroessner, 5) construction of cement silos with total capacity of about 7,000 metric tons and ancillary installations, 6) construction of various buildings at agricultural experimental center Capitan Miranda, Department of Itapua (2,300 sq. meters). Foreign contractors must designate Paraguayan representative, who must comply with same legal requirements as national contractors. Specifications and instructions required for prequalification available from Direccion Administrativa, Ministerio de Agricultura Y Ganaderia, Calle Presidente Pranco 479, Asuncion, for 3,000 guaranies ($23.81) for deposit at Current Account Number 545-370-04, Banco National de Fomento, Asuncion.

• **15100—SYRIA**—Second call for planning, implementing, financing, and carrying out WKAF building scheme according to specifications issued July 16 under Order No. 4730. Project consists of 30,000 sq. meters commercial center with mosque on ground floor on 7,000 sq. meter tract of land in city of Damascus. Bond of 500,000 Syrian pounds required. Tender documents available upon request from Ministry of WAKF, Damascus. Identification no. 6835. Deadline Jan. 20.

• **15110—MOROCCO** — The Ministere De L'Enseignement Superieur, Direction Des Projects Education (I.D.A.) 77, Bis, Avenue Moulay Ismail, Rabat, has issued Tender No. I.D.A. No. 266 for construction of the Rabat National Pedagogic Institute. Area includes administrative building, libraries, conference rooms, meeting halls, laboratories, printing house, and garage. Bid deadline Feb. 6. Copies of tender announcement and specifications available from above address for approximately $7.

Construction

• **16100—EL SALVADOR** — Ministry of Public Works invites road building contractors from eligible Inter-American Development Bank member countries and El Salvador to bid on reconstruction and paving of 67.8 kms. of highway, comprising following sections: a) Placitas to San Rafael, Oriente-Ca-2, 16.3 kms.; b) Jiquilisco to Puerto El Triunfo, 7.2 kms.; c) Suchioto to San Martin-Ca-1, 26.0 kms.; and d) Ilobasco to San Isidro, 18.3 kms. Requires land grading and drainage leveling works, and double asphalt surface application. Estimated total cost $10 million. Jointly financed with Government of El Salvador funds and IDB Loan Contract No. GOES-IDB 32/SF-ES. Bidding regulations and technical tender specifications available for 250 Colones (US$100), for each of the four specified highway sections, from: Proveeduria Especifica del Ministerio de Obras Publicas, 12 Calle Poniente 228, San Salvador, El Salvador. Tender identification is "Licitacion 58." Bid deadline Jan. 13, bids to be in Spanish.

• **16100—MOROCCO**—Preselection of firms willing to bid for engineering and construction of Casablanca Urban Highway RP. 35, including interstate highway-type interchanges and related engineering works respecting traffic flow, exit, and re-entry. Financed by Moroccan equipment budget. Bids, due by Jan. 15, must be in French. Write to Monsieur le Directeur des Routes, Ministere des Travaux Publics et des Communications, Rabat.

Heavy construction, except highway and street construction

• **16200—LIBYA**—The General Administration of Water Wealth, Ministry of Industry and Minerals, Alfath Road, Tripoli, invites local and international registered contractors to bid for reconstruction and development of Tripoli fishing port. Works required are: dredging, reclamation, quay walls, road paving, fences, water and electrical networks, and administrative buildings. Tender number

is 1/74. Tenders must attach qualifications, experience, and financial status of firm. Firms must be registered at Ministry of Housing and Utilities or represented by a registered firm. Tender is divisible. Tender documents available for LDS 100 (US-$300. Tenders must be accompanied by guarantee of LDS 25,000 (US $85,000). Bid deadline Feb. 1.

Logging camps, logging contractors

• **24110—PAKISTAN**—The Pakistan Railway Board requests bids on: 205,000 hardwood crossties, 9′ by 10″ by 6″; 150,000 hardwood crossties, 9′ by 10″ by 5″; 11,857 hardwood bridge timber of assorted sizes totaling 50,928 cubic feet; 43,700 crossing timbers of assorted sizes. Request c and f Karachi price quotation and delivery date. Shortest delivery preferred. Price quoted must be valid for 60 days from bid deadline of Jan. 27. Financing to be arranged through Pakistan's own foreign exchange resources or under terms and conditions of "suppliers credit" if found satisfactory to Pakistan Railways. Tender documents can be purchased up to Jan. 25 from Secretary, Railway Board, Ministry of Railways, Government of Pakistan, Pakistan Railway Headquarters, Empress Road, Lahore, Pakistan or from District Controller of Purchase (Inspection), Pakistan Railways, Karachi Cantonment, Pakistan for $8.

Public building, related furniture

• **25300—ALGERIA**—Furniture and equipment for the university library at Constantine. Offer to be f.o.b. and to include detailed technical literature and remain valid 90 days past bid deadline. Tender No. 74/03. Bid deadline Jan. 31. Variations on specifications acceptable if identified. Correspondence and offer required in French, all specifications metric. Submit offers by registered mail to: Sous-Direction des Constructions et des Equipements, Ministere de l'Enseignement Superieur et de la Recherche Scientifique, 1, rue Bachir Attar, Place de le Maxi, Algiers. Copies of tender announcement and specifications in French available on short-term loan basis to firms located in U.S. from Science & Electronics Div., BDC-466, U.S. Dept. of Commerce, Washington, D.C. 20230, ★ 202-967-2939.

Pulp mills

• **26110—SRI LANKA**—Government of Sri Lanka (Ceylon) requests offers of 2,000 metric tons of unbleached kraft (sulphate) long-fibered pulp suitable for manufacture of wrapping paper when combined with high percentage of straw pulp; with four shipments in quantities of 300 metric tons, March 1975 through early 1976 and according to TAPPI testing methods and technical specifications and general terms detailed in tender dated Nov. 4, 1974. Bid deadline Jan. 23. Copy of tender available from Construction and Forest Products Division, DIBA, U.S. Department of Commerce, Room 2113, Washington, D.C. 20230, ★ 202-967-3003.

Industrial chemicals

• **28100—AUSTRIA**—A research project involving effects of radioactive carbon dioxide on plant growth is being undertaken by the Institute of Radiochemistry and Applied Physical Chemistry of Innsbruck University. Institute needs growth chamber installation permitting simulation of various types of climates. Unit must be equipped with automatic temperature, humidity, irradiation time controls, and be absolutely airtight. Interested parties write: Dr. O. Bobleter, Institut fuer Radiochemie und Angewandte Physikalische Chemie der Universitaet Innsbruck, Innrain 62A, A-6020 Innsbruck.

2819930—MALAGASY REP.—Chloroquine sulfate (for production of anti-malaria medicine). Firm wishes price quotation (f.o.b., U.S. port & c.i.f., port of Tamatave) for 18-ton shipment. Additional sales could result if price competitive. Firm, small Malagasy-French owned pharmaceutical mfg., has excellent reputation & credit standing. Reply to—M. Charles Ramanantsoa, Pres., Laboratoires Pharmaceutiques Malgaches, Boite Postale 828, Mandrosoa, Ivato Tananarive. Cable Farmad; tel. 444-15.

Agricultural chemicals

28790—INDIA—Supply of pesticides as follows, with immediate and regular annual requirements, in metric tons: BHC, 2,500—6,000; DDT, 3,500—4,000; malathion, 600—750; endrin, 500—680; endosulfan, 350—800; phorate, 100—200; carbaryl, 5,000—5,000; toxaphene, 200—700; aldrin, chlordane, heptachlor, 100 (each)—450 (total); monocrotophos, 100—250; paraquat, 100—270; dalapon, 100—250. Also required over next 12 months are propanil (50 metric tons). alachlor butachlor (200), MSMA/DSMA (200) nitrofon (250), misc-new herbicides (200) and plant-growth regulants (50). All materials to be technical grade conforming to W.H.O. specifications. Imports will be made against free foreign exchange. Send offers directly to Prem Prakash, Chief Marketing Manager, IRMAC/STC, "Chandralok," 36 Janpath, New Delhi, India 110001. Telex: 031-7380; cable ESTICI.

Concrete, gypsum, plaster products

3273011—JAPAN—Cement & gravel mixed, trade name reportedly "Post Crete," or equal, packed in cartons. Buyer saw brief introductory article about above item in unidentified U.S. industrial magazine. Buyer is exporter of hardware & distributor of hardware, construction & civil engineering materials. 1973 annual sales $30 million. Reply to—K. Ishikura, Mgr., Foreign Trade Dept., Ishikura & Co., Ltd., 62, Kajiya-Machi Minami-Ku, Osaka 542. Cable Iskrhardware Osaka, tel 06-261-0271.

Abrasive, asbestos, nonmetallic mineral products

3292785—TAIWAN — Asbestos pipe line felts, prefabricated with glass yarn reinforcement, 8 lbs. per 100 sq. ft., width 12 in., length/roll 800 ft. Total initial quantity 2,000 rolls. Offer f.o.b. price, soonest delivery. Cable—H. Hagiya, Gen. Mgr., Nasa Int'l (Taiwan) Corp., Room 303, Huanan Bldg., 162 Chang An East Road, Sec. 2, Taipei, Taiwan 104. Cable Nasaval Taipei; tel. 752061; telex 22522 Jmason.

Rolling, drawing, extruding of nonferrous metals

• **33500—ETHIOPIA**—PVC insulated lead-in telephone wire for indoor installations, solid tinned-copper conductors with diameter of 2 x 0.77MM; wire jumper in diameter of 2 x 0.5MM. Project financed by IDA loan. Tender No. 23/74; bid deadline Jan. 9. Beyene Desta, Acting General Manager, Telecommunications Board of Ethiopia, P.O. Box 1047, Addis Ababa. Specifications available from Iron and Steel Program, BDC, U.S. Department of Commerce, Washington, D.C. 20230, ★ 202-967-2438.

Engines, turbines

• **35100—LIBYA**—Supply, installation and operation of three 25-miliwatt gas turbine generators, 60 KV transmission station attached to main one, fuel storage and all necessary attachments. Bid deadline Feb. 17. Tender documents available from Executive Committee of Sarir and Kufra, Alfuehat Ring Road, Benghazi, Lar upon payment of $1,700. Tenders must be accompanied by a guarantee of $135,000.

Farm machinery

35200—SURINAM — Chang Pien Liang, Achterstraat 36 or P.O. Box 21, Nieuw Nickerie, Nickerie, Surinam, cable Chang Pien Liang, Nieuw Nickerie, wants price quotations, descriptive literature and earliest delivery dates on one complete paddy drier. Drier should be fully automatic with capacity of 10-15 tons per hour and operate on 220 volts, 3 phase. Buyer estimates this order may be worth $250 000. Chang Pien Liang is a large rice miller and exporter (largely to Caribbean countries) situated in heart of largest rice-growing area of Surinam. Local trade and banking sources report he enjoys an excellent reputation. Chang's bank is De Surinaamsche Bank, Nieuw Nickerie.

Special industry machinery

• **35590—TAIWAN**—Supply of machinery and equipment for polypropylene woven bag plant with production capacity of 2.8 million bags annually. Bags to be used for packing granulated sugar. Bid deadline Jan. 7. Tender issued by Procurement Department, Central Trust of China, 49 Wuchang St., Sec. 1, Taipei, Taiwan (100), Rep. of China. Bids limited to Western Hemisphere and Western European Countries. Plant includes following types of machinery: (a) equipment for production of woven cloth, from resin, tape to cloth, (b) automatic heat cutter, (c) sewing machine, (d) bag printing machine, (e) recovering unit, (f) baling press. Specs of bags are: L type or non sewing type; 56 cm. width by 88 cm. length; capacity—50 kg. granulated sugar; tape yarn dernier—1000 with 99% of denier 950-1050; density 17 plus/minus 1 lines per inch. Single bid award. Tender specs available from Transportation and Capital Equipment Division, Room 2130, U.S. Department of Commerce, 14th & Constitution, NW., Washington, D.C. 20230.

• **35590—ECUADOR**—Supply and installation of one or two brick making plants at Quito and Guayaquil. Bid deadline Feb. 17. Capacity of 340-350 tons per day. Machinery should be capable of extraction of raw materials, transportation to plant site and preparation of the raw materials; shaping by extrusion; drying and storage of end product; construction of work shop and offices and storage warehouse; testing laboratory; equipment for special installation; equipment for internal transportation. Bidders must provide technical documentation with respect to installation and assembly of machinery, project review, personnel, training, and supply of spare parts. Tender documents available for U.S.$40 from Comite de Licitations, Banco Ecuatoriano do la Vivienda, (BEV). Avenida Cristobal Colon 1664, Quito. Tenders must be presented in person to the bank and U.S. firms would appear to need a local legal representative.

3559241—AUSTRALIA—Foundry flasks 18 in. by 12 in. with outside lugs, to be made to specs. supplied. Long estab. & now subsidiary of Borg-Warner (Aust) Ltd. Operates Australia-wide & offers good potential. Reply to—F. Jackson, Purchasing Mgr., Thomson & Scougall, 1 Unwin's Bridge Road, St. Peters, N.S.W. 2044. Cable Tees; tel. 51 8822.

3559589—MALAGASY REP. — Vacuum pump, refrigeration unit, grinding machines, chopping machines, extractors, filters, washing tanks, porcelain tubs, other machinery & equip. for installation of complete semi-automatic processing operation for production of isinglass (agar-agar) from seaweed. Anticipated annual production 25-50 tons. Supplier

of equip. must be able to provide tech. assistance in setting up operation. Firm wishes specifications, price quotations (f.o.b., U.S. port & c.i.f., Port of Tulear). Barday, wellest. reputable firm, presently runs salt extraction operation which has staff of 70 & annual sales of $500,000. Recently started seaweed collection & export operation & wishes to expand into processing. Reply to—B. Barday, Gerant, Comptoir B. J. Barday, Boite Postale 165, Tulear. Cable Bajabay Tulear; tel. 422-44.

General industrial machinery

• **35610—KUWAIT**—Supply of one mobile centrifugal pump. Bid deadline Jan. 12. Tenders issued by Ministry of Electricity and Water, P.O. Box 12, Kuwait. Tender documents available from above for 1 Kuwait Dinar ($3.38). Bidders must be represented in Kuwait by local agent. Embassy willing to assist locating agents for interested American firms.

• **35610—ECUADOR** — The Ecuadorean Sanitary Public Works Institute, IEOS, seeks to purchase complete pumping station equipment for use in potable water and sewage system. Pumping volumes range between 250-500 liters. Equipment should have reserve system for emergencies. Pumping height requirement between 30 and 90 feet. Pumps should be adequate for a "wet well." It is essential that equipment be protected against water hammering and that manufacturer also provide full set of valves for pumps. Catalogs, specs., and prices sought. Spanish correspondence. Contact should be made with ING. Roberto Reyes, Igeniero de Diseno, Instituto Ecqutoriano de Obras Sanitarias, IEOS, P.O. Box 680, Quito. No set deadline.

• **35610—THAILAND**—Supply and installation of 4 pumping units, volute type, for finished water at Lumpini Park. Bid deadline Feb. 3. Also supply and installation of 3 volute type pumping units for finished water at Tha Phra distribution pump station. Units for Lumpini to be of rated capacity 104 cmm., rated head 55 m., min. shut-off head 65 m., max run-out head 40 m. Driver to be induction type of min. h.p. driver size 1600. Power to be 3-phase 50 hz. 3,300 volt, with full voltage starters. Max. speed 750 rpm. Units for Tha Phra to be of rated capacity 118 cmm., rated head 50 m., min. shutoff head 62 m., max run-out head 40 m. Driver to be induction type, min. hp. driver size 1600. Power to be 3-phase, 50 hz., 3,300 volt with full voltage starters. Max speed 750 rpm. Also supply and install one finished water pumping unit at Tha Phra similar to above units but of rated capacity 85 cmm., min. hp. of driver size 1,200. Project financed by World Bank loan. Tender offered by Metropolitan Water Works Authority, Siyak Mansri, Sapan Dum, Bangkok. Tender documents available from Commercial Section, U.S. Embassy, 95 Wireless Road, Bangkok, for $260 a set. APO San Francisco 96346.

• **35610—THAILAND**—Supply and installation of 3 pumping units, horizontal, double suction type, rated capacity 300 cmm. Bid deadline Feb. 3. Pumps to be installed at Bang Khen transmission pump station for finished water. Rated head 32 m., max. run-out head 22 m. Driver to be synchronous type, of min. hp. driver size 2500. Power to be 3-phase, 50 hz., 6,000 volts, reduced type starters. Max. speed 375 rpm. Also supply and install one pumping unit of rated capacity 153 cmm., min. hp. of driver size 1250, max speed 500 rpm. Tender documents available from U.S. Embassy, Commercial Section, 95 Wireless Road. Bangkok, APO San Francisco 96346. Cost $250 per set. Offer is made by Metropolitan Water Works Authority, Siyak Mansri, Sapan Dum, Bangkok. Project financed by World Bank loan.

• **35610—THAILAND**—Supply and installation of 4 horizontal axial flow propeller pumps, for raw water at Sam Lae pump station. Bid deadline Feb. 3. Rated capacity 400 cubic meters per minute. Rated head 3 m., run out head not over 1 meter. Driver to be synchronous w/minimum hp. of driver size 400 hp. Power to be 3-phase, 50 hz., 3300 volts, reduced type starter. Max. speed 250 rpm. Project financed by IRBD loan. Tender issued by the Administrative Staff, Purchasing and Material Division, Room No. 310, Office of Capital Development Projects, Metropolitan Water Works Authority, Siyak Mansri, Sapan Dum, Bangkok. Tender documents may be purchased for $200 a set from Commercial Section, U.S. Embassy, 95 Wireless Road, Bangkok. APO San Francisco 96346.

• **35610—TURKEY**—Supply of 48 pumps, consisting of boiler feed pumps, circulating water pumps, and condensate pumps for 4 x 300 MW Elbistan-Afsen Thermal Power Plant. Bid deadline Feb. 11. Tender specs available from TEK-Turkize (see address in No. 6 C) at a cost of 1,000 Turkish Lira (TL1385 to U.S.$1).

• **35610—THAILAND**—Supply and installation of 3 pumping units, horizontal axial flow (mixed flow) type, for raw water at Bang Khen water treatment plant. Bid deadline Feb. 3. Rated capacity 348 cmm., rated head 9.3 m. Driver to be synchronous type of min. hp. driver size 900. Power to be 3-phase, 50 hertz, 6,000 volt with full voltage starter. Max. speed 375 rpm. Supply and install one horizontal axial flow (mixed flow) type for raw water at same plant. Rated capacity 174 cmm., rated head 9.3 meters. Driver to be induction type min. hp. driver size 450. Power to be 3-phase, 50 hz., 6,600 volt, with full voltage starter. Single speed driver, magnetic-air-cooled, range 80 to 100%, max speed 500 rpm. Project financed by World Bank loan. Tender issued by Administrative Staff of Purchasing and Material Division, Room No. 310, Office of Capital Development Projects, Metropolitan Water Works Authority, Silak Mansri, Sapan Dum, Bangkok. Tender documents are available from the Commercial Section, U.S. Embassy, 95 Wireless Road, Bangkok, APO San Francisco 96346.

• **35610, 35640—THAILAND**—Supply and installation of 3 pumping units, horizontal double suction volute type, for finished water at the Bang Khen water treatment plant. Bid deadline Feb. 3. Rated capacity 108 cmm., rated head 8 m., min. shut-off head 12 m., max run-out head 5 m. Driver of induction type with min. hp. driver size 250. Power to be 3-phase, 50 hz., 380 volt with full voltage type starter. Variable speed drive, magnetic-air-cooled, range 50-100%, max speed 429 rpm. Also supply and installation of three positive displacement rotary air blowers. Rated capacity 195 cmm. Induction type driver of min. hp. driver size 300. Power to be 3-phase, 50 hz., 380 v., with full voltage starter. Max. speed 750 rpm. Project financed with World Bank loan. Tender issued by Metropolitan Water Works Authority, Bangkok. Tender documents available from Commercial Section, U.S. Embassy, 95 Wireless Road, Bangkok, APO San Francisco 96346. Cost per set is $150.

• **35690—BARBADOS** — Managing director of leading bookstore in Barbados wishes to engage in manufacture of jig saw puzzles for both recreational and educational purposes. Firm wishes to purchase necessary machinery and equipment for manufacture and sale of such puzzles in Barbados and other Caribbean countries. No fixed deadline. Inquiries should be directed to Mrs. Ann Musgrave, Managing Director, Cloister Bookstore Ltd., Hincks St., Bridgetown, Barbados, W.I. Tel. 63467. Latest WTDR (BTN—1416—10/9/73) shows firm to be suitable contact for U.S. firms within limits of its size and experience. Purchase est. value $15,000-30,000.

• **35690—THAILAND**—Supply and installation of 4 water clarifiers in circular concrete tanks, 58 meters in diameter. Units are to be of solid contract up-flow type. Max. capacity of each is 20,000 cmd., with min. sidewall depth of 5.18 m., and center depth of about 7.5 meters. Bid deadline Feb. 3. Project financed by World Bank loan. Offer is made by Metropolitan Water Works Authority, Siyak Mansri, Sapan Dum, Bangkok. Tender documents available for $32.50 each from Commercial Section, U.S. Embassy, 95 Wireless Road, Bangkok, APO San Francisco 96346.

Electric transmission, distribution

• **36110 — COLOMBIA** — The Empresas Publicas de Medellin, Seccion de Importaciones, Edificio Miguel de Aguinaga Oficina 607, Medellin, Colombia, has issued Tender No. 18-10-74 for flowmeter, induction motors, pumps and outside transformer. Bid deadline Feb. 6. Copies of tender announcement and specifications available from above address for approximately $135.

• **36110—INDIA** — Central Foundry Forge Plant, Bharat Heavy Electricals Ltd., Ranipur-Hardwar, Uttar Pradesh, has issued Tender No. CFF/PE/IMP/2029 for manufacture, supply and installation of carbon sulfur analyzer for steel melting laboratory. Bid deadline Jan. 20. Specifications available from above address for $6.25 or on short-term basis to firms located in U.S. from Science & Electronics Div., BDC-466, U.S. Dept. of Commerce, Washington, D.C. 20230, ★ 202-967-2939.

• **36110—INDIA** — Central Foundry Forge Plant, Bharat Heavy Electricals Ltd. (BHEL), Ranipur (near Hardwar), Uttar Pradesh, has issued Tender No. CFF/PE/IMP/2030 for supply and installation of analyzer to determine hydrogen in steel. Bid deadline Jan. 21. Specifications available from above address for $6.25 or on short-term loan basis to firms located in U.S. from Science & Electronics Div., BDC-466, U.S. Dept. of Commerce, Washington, D.C. 20230, ★ 202-967-2939.

• **36110—IRAN**—The Ministry of Water & Power, Avenue Varzesh, Tehran, has issued Tender No. 1272/1 for supply and construction of a central electrical laboratory. Specifications available on short-term loan basis to firms located in U.S. from Science and Electronics Division, BDC-466, Room 1001, U.S. Dept. of Commerce, Washington, D.C. 20230, ★ 202-967-2939.

• **36110 — THAILAND** — The Purchasing Division, Provincial Electricity Authority (PEA), Ngam Wong Waan Road, Bangkhen, Bangkok, has issued Tender No. PEA-L-2/1975 for supply of two wire-connected, double-jewel bearing, 4,000 & 25,000 kilowatt-hour meters. Bidders can select alternative, quoting separately price of meters with magnetic floating bearing. Copies of tender announcement and specifications available from above address for $200 per set or on short-term loan basis to firms located in U.S. from Science & Electronics Div., BDC-466, Room 1001, U.S. Dept. of Commerce, Washington, D.C. 20230, ★ 202-967-2939.

Electrical industrial apparatus

• **36200—INDONESIA**—Seven 3-phase 15-18 KVA, 127/220V, 50 HZ, AC generator sets driven by one or two cylinder aircooled diesel engines. Tender No. 13/IDA/N/XI/74, bid deadline Jan. 8. Liaison Office P.N.P.X., Jalan Jendral S. Parman (2nd Floor), Slipi, Jakarta. Tender copies available from above address for $12.05 per copy.

Electric lighting, wiring equipment

• **36430—THAILAND**—Purchases & Stores Department, Metropolitan Electricity Authority, 121 Chakphet Road, Bangkok 2, has issued Tender No. ADB-MEA-205 for various types of distribution and station valve arresters. Bid deadline Feb. 7. Copies of tender announcement and specifications available from above address for $5 per set.

Communications equipment

• **36600—PHILIPPINES** — Communication system for the upper Pampanga River project including manufacture and installation of a digital microwave system and integrated VHF-FM network to link at least 5 offices in the upper Pampanga River project. Bid deadline Jan. 15. Copies of contract documents availble upon non-refundable payment of $15 per copy from following addresses: National Irrigation Administration, P.O. Box 465, Greenhill, Rizal, Philippines D-738. Cable address: Niaphil, Manila; or The Associated Firms, ECI-EDCOP, P.O. Box 1493, Manila.

• **36610—ALGERIA**—Ministere des Postes et Telecommunications, 4, Blvd., Salah Bouakouir, Algiers, is seeking bids for coaxial connectors. Bid deadline Jan. 12. Copies of tender announcement and specifications available from above address for $47.71.

• **36610—ETHIOPIA**—Beyene Desta, Acting General Manager, Telecommunications Board of Ethiopia (TBE), P.O. Box 1047, Addis Ababa, has issued Tender No. 24-74 for supply of 2,000 outdoor and 630 indoor terminal boxes for subscriber distribution network. Bid deadline Jan. 14. Copies of tender announcement and specifications available on short-term loan basis to firms located in U.S. from Science & Electronics Division, BDC-466, Room 1001, U.S. Dept. of Commerce, Washington, D.C. 20230, ★ 202-967-2939.

• **36610—INDIA**—Director General, Posts & Telegraphs (MMD Section), Parliament St., New Delhi, 110 001, has issued Tender No. 12-114/74-MMD for trial equipment for digital section of Telecommunications Research Center. Bid deadline Jan. 20. Copies of tender announcement and specifications available from above address for $2.75.

• **36610—THAILAND** — Chief of the Procurement Division, Telephone Organization of Thailand, Ploenchit Road, Bangkok, is seeking bids for supply and construction of a junction network linking 27 existing telephone exchanges with 13 new sites. Project is financed by Export-Import Bank of Japan. Only bids from member countries of Development Assistance Committee will be considered. Bid deadline March 5. Tender documents available at above address for $500.

• **36620—ALGERIA** — Service Voie et Batiment, Bureau SES, SNCFA, 21/23, Blvd. Mohamed V, Algiers, is seeking telephone equipment for communications between mining centers. Bid deadline Jan. 27. Copies of tender announcement and specifications, in French, available on short-term loan basis to firms located in U.S. from Science & Electronics Div., BDC-466, Room 1001, U.S. Dept. of Commerce, Washington, D.C. 20230, ★ 202-967-2939.

• **36620 — COLOMBIA** — Jaime Aguilera Blanco, Presidente, Empresa Nacional de Telecomunicaciones, Telecom, Calle 23 No. 13-49, Bogota, has issued Tender No. BIRF III-08 for high frequency transmission equipment. Bid deadline Jan. 22. Copies of tender announcement and specifications available from above address for $166. Bidders must be represented in Colombia.

• **36620 — COLOMBIA** — Jaime Aguilera Blanco, Presidente, Empresa Nacional de Telecomunicaciones, Telecom, Calle 23 No. 13-49, Bogota, has issued Tender No. BIRF III-09 for VHF/UHF transmission systems. Bid deadline Jan. 22. Copies of tender announcement and specifications available from above address for $166.

• **36620—ECUADOR** — Armada Del Ecuador, Escuela de la Marina Mercante Nacional, P.O. Box 7412, Guayaquil, is seeking electronic laboratory for teaching of languages, with capacity for 30 simultaneous listeners, 60 cycle, 110/220 volts. Interested U.S. firms invited to send literature and price quotations to above address.

• **36620—GREECE** — Hellenic Air Force Command, Public Works Directorate, 40 Dimitriou Soutsou St., Athens, is seeking bids from NATO certified firms for supply and installation of a pulse code modulation radio system. Bid deadline Jan. 31. Copies of tender announcement and specifications available on short-term loan basis to firms located in U.S. from Science and Electronics Division, BDC-466, Room 1001, U.S. Dept. of Commerce, Washington, D.C. 20230, ★ 202-967-2939.

• **36620—INDIA**—Director General, Posts and Telegraphs, Parliament St., New Delhi 110001, has issued Tender No. 12-112/74-MMD for microwave links from terminal stations to transmitter sites. Bid deadline Feb. 11. Copies of tender announcement and specifications available from above address for $2.50 per set or on short-term loan basis to firms located in U.S. from Science and Electronics Division, BDC-466, Room 1001, U.S. Department of Commerce, Washington, D.C. 20230, ★ 202-967-2939.

• **36620—INDIA**—The Municipal Corporation of Greater Bombay, Head Office Extension Bldg., 111 Floor, Mahapalika Marg, Fort, Bombay 400 001, is seeking telemetry and instrumentation equipment for water supply project. Bid deadline Jan. 31. Tender documents available from above address for $267.

• **36620—INDIA**—The Directorate General of Supplies and Disposals, Jeevan Tara Bldg., Parliament St., New Delhi, 110 001, has issued Tender No. P/106/82/223/7.9.74/II for flight and tactical simulator. Bid deadline Jan. 30. Copies of tender announcement and specifications available from above address for $10.

• **36630—MEXICO**—Luis Gomez Zepeda, Gerente General, Subgerencia de Adquisiciones de los Ferrocarriles Nacionales de Mexico, Avenida Central No. 140, 4 Piso, Ala A, Mexico, D.F., is seeking bids for UHF and VHF radio equipment. Bid deadline Feb. 19. Copies of tender announcement and specifications available from above address for $320. Correspondence must be in Spanish.

Electric components, accessories

• **36740—INDIA**—B. L. Thakur, Asst. Purchase Officer, Bhabha Atomic Research Centre, Purchase Division, III floor, Mohatta Bldg., Palton Road, Bombay 400 001, has issued Tender No. PDN/BARC/MIA/6249 for one 16-bit computer. Copies of tender announcement and specifications available on short-term loan basis to firms located in U.S. from Science & Electronics Div., BDC-466, U S. Dept. of Commerce, Washington, D.C. 20230, ★ 202-967-2939.

Electrical machinery, equipment, supplies

• **36930—IRAQ**—Director General of Medical Supplies, Ministry of Health, Baghdad, has issued Tender No. 27/74 for mobile and fixed x-ray units. Bid deadline Feb. 25. Copies of tender announcement and specifications available on short-term loan basis to firms located in U.S. from Science & Electronics Div., BDC-466, Room 1001, U.S. Dept. of Commerce, Washington, D.C. 20230, ★ 202-967-2939.

Aircraft, parts

37281XX—AUSTRIA—Aircraft parts, accessories related equip. for other than U.S. military customers. Inquirer, distributor for W. & E. Europe & N. Africa of Bellanca Aircraft Corp., Alexandria, Minn., currently engaged in building up organization of dealers throughout Europe, is interested in enlarging scope of activities by importing & representing aircraft parts, accessories & related equip. Documented offers, including technical literature & price quotations requested. Dir. sale for resale & dist. for W. & E. Europe. Reply to Wilhelm E. Pilz, Mgr., Holiday Air Ges.M.B.H., Innsbrucker Bundesstrasse 128, A-5021 Salzburg. Cable Holiday Air; telex 06/3824; phone 06222/44501/230.

Instruments for measurement, analysis and control

• **38200—THAILAND**—Supply of 900 kilowatt-hour meters, single-phase, two-wire connection, 220 V., 50 HZ., rated current 30 (69) A; 200 kilowatt-hour meters, similar to above except rated current 50 (100) A. Tender No. PEA-I-42/1974. Bid deadline Jan. 6. Project is financed by Purchasing Division Electricity Authority (PEA), NGAM Wong Waan Road, Bangkhen, Bangkok. Documents available from above address at $7.50 per set.

• **38210—COLOMBIA** — Plan Maestro de Acueducto, Empresa Acueducto y Alcantarillado de Bogota D.E., Calle 22-C, No. 40-99 of 201, Bogota, has issued Tender No. 353-OP-II-I for 40.000 water meters and accessories for residential use. Bid deadline Jan. 17. Specifications may be purchased at above address for $75.

• **38290—INDIA** — Manufacture, supply, erection, and commissioning of a rapid carbon sulfur analyzing apparatus for steel melting laboratory. Bid deadline Jan. 20. Tender documents available from Materials Manager, Central Foundry Forge Plant, Bharat Heavy Electricals Ltd., Ranipur-Hardwar, Uttar Pradesh. Cost 50 rupees (approx. $6.25).

• **38290—INDIA** — Manufacture, supply, erection, and commissioning of an analyzer for determining hydrogen in steel melts complete with heating system, vacuum extraction unit and other essential ancillary equipment. Bid deadline Jan. 21. Tender documents available for 50 rupees (approx. $6.25) from Materials Manager, Central Foundry Forge Plant, Bharat Heavy Electricals Ltd., Ranipur-Hardwar, Uttar Pradesh.

Manufacturing industries

• **39900—INDIA**—Supply of fire extinguishing and smoke detecting plant for machinery cargo spaces. Tender No. COP/Q/PT375/22957/VC. 171008 & 171009. Bid deadline Jan. 20. Tender terms and specifications available from S. Satyanarayana, Controller of Purchase, Hindustan Shipyard Ltd., Visakhapatnam 5, India, upon receipt of a crossed Indian postal order for RS. 10 drawn in favor of above Hindustan Shipyard Ltd.

Gas production & distribution

• **49220, 49230—TUNISIA** — Tunisia plans construction of facilities to approximately double collection of wet natural gas at El Borma Field in Tunisian Sahara. LPG to be flared and dry gas shipped through existing pipeline to Gabes. Four separate projects open to bidding. Bid deadline Jan. 15. Items

as follows: Gas pipeline; No. EBM—6—approx. 20 km. of gas pipeline 12¾ in. diam. w/assoc. installations. No. EBM—7—Gas treament and compression installations. No. EBM—8—PKO and PK112 compressors to pump dry natural gas through pipeline. No. EBM—9—Refrigeration facilities for gas. Present capacity is 500,000 cubic meters dry natural gas per day, 60/80 cubic meters of liquefied butane and propane. Tender documents available from Societe Tunisienne de l'Electricite et du Gaz, through Sadok Bahroun, President Director General, 38 Rue Kamel Ataturk, Tunis. Cost 50 Tunisian dinars per item.

Special product groups

• **99151—TURKEY**—Supply and installation of water treatment facilities composed of: demineralization and condensate polishing plant; cooling water treatment facility, drinking water treatment plant; laboratory equipment—required for 4x300 megawatt capacity; and sewage plant. Bid deadline Jan. 21. Specifications may be obtained for 1,000 Turkish lira ($73) per copy from tenderer; Tek Santrallar Dairesi Baskanligi (Turkish Electricity Authority), Necathibey Caddesi, E, Maro Man, Kat 5, Yenisehir-Ankara-Turkey. Offers should be submitted in triplicate, indicating previous experience in successfully completing 3 projects of this type. Financing for the opencast lignite mine and thermal power plant complex is coming from World Bank, European Investment Bank, EEC credits, and the Turkish Government.

Representations

Foreign private firms are interested in agency agreements and/or distributorships for these products.

Soap, detergents, cleaning preparations, perfumes, cosmetics

2844XXX—AUSTRIA—Large manufacturer and distributor of sanitary cotton, cleaning tissues and the like wishes to broaden line to include toilet articles such as soaps, shaving creams, tooth paste, hair preparations, brushes, combs, etc. Firm seeks agency for Austria only. Interested parties should send catalogs and quotations to: H. Walli G.M.B.H., Schwartzenbergplatz 16, A-1011 Wien, Austria. Attention: Mrs. L. Waldhaeusel. Quotations c.i.f. Austrian border. Terms of payment—open account. Correspondence in English or German.

Elevators and moving stairways

3534005 — JAMAICA — Electric passenger elevator to transport paraplegic together with wheelchair up & down between ground floor & 1st floor (distance of 14 ft.). Due to bldg. design, it may be necessary to install elevator system in independent, self-supporting steel structure on outside wall of bldg. Quotations c.i.f. Kingston. Write—W. Soutar, Mng. Dir., Will's Battery Co. Ltd., 66 Slipe Road, Kingston 5. Tel. 926-5921.

Photographic equipment

3861342—THAILAND — Loop film projectors, using standard & super 8 mm films, technicolor-type cartridge or other cassettes, with or without built-in rear-projection screen, silent & sound (magnetic) models. Requests c.i.f. Bangkok prices, catalogs. Excl. distributorship. Reply to—Ek Siam Walla, Dir., D. H. A. Siamwaila Ltd., 210 Surawong Road, Bangkok. Siamwalla 33988-9. Excl. agent.

Future Construction Abroad

ALGERIA—The Algerian Government is inviting firms to submit offers for prequalification to bid on design, construction, and startup of a **salt extraction unit** at Guemel, Setif, in Eastern Algeria. Requires hydrogeologic and geologic studies, preparation of tender, assistance in bid analysis, and startup of a unit with annual capacity of 150,000 to 300,000 metric tons. Offers must be in duplicate and must reach the Direction Generale, SONAREM, 127, Salah Bouakouir, Algiers, by Dec. 31. An expression of interest received within the deadline is acceptable. It should be in duplicate and include reference to experience on similar projects. Further information may be obtained from Mr. Berhorma, Project Chief, SONAREM, Division Engineering et Developpement, Project Sel, Rue Bernard Amiot, Cing-Maisons, El-Harrach, Algiers; cable: MINEBAR ALGIERS; telex 52910; phone 76-51-60 to 62. Correspondence and offers must be in French; specifications must be metric. Copies in French of tender documents available for review with Cherie Loustaunau, Commerce Action Group for the Near East, BIC, U.S. Department of Commerce, Wash., D.C. 20230 (202-967-4441).

HONG KONG—Construction of a large new **urban development project** will begin in about a year on a 56-acre site stretching from the Star Ferry to Hunghom. Plans approved by the Public Works Department include hotels, office buildings, apartment blocks, shops, open recreation spaces, multi-story carparks, and schools. Although a precise cost analysis and a definite concept for financing has not been completed, this project will probably offer many opportunities for U.S. suppliers. Interested firms should contact Kerwin Yan, Town Planning Officer, Public Works Dept., San Po Kong Government Office, 4/F, 962 Prince's Edward Rd., Kowloon.

BOLIVIA—Firms interested in bidding on a **37-kilometer paved road** from Huarina to Tiguina valued at approximately $2.5 million may purchase the tender for $150 by contacting Ing. Alfonso Balderrana M, Director, Servicio Naccional de Caminos Bolivia, Division de Construcciones, Casilla 1485, La Paz, Bolivia (cable: Senac La Paz Bolivia). Bid deadline is Jan. 15.

BOLIVIA — The Minister of Energy & Hydrocarbons presented to the National Economic & Planning Council for its consideration a **list of YPFB projects** including those in execution and others in planning stage. The total investment in the next five years reportedly amounts to $1.527 billion. **Pipelines and gas cleaning plants:** natural gas pipeline, Santa Cruz to Corumba, est. cost U.S.$300 million; another petroleum pipeline Santa Cruz-Arica, U.S.$351 million; 6 branch petroleum pipelines and 1 branch gas line in Santa Cruz Dept.; potosisucre multipurpose petroleum liquid derviatives pipeline, est. U.S. $1.75 million; construction to begin in 1975 or 1976; natural gas pipeline Sucre-Oruro, est. U.S.$12 million; increase capacity of Santa Cruz-Yacuiba pipeline by installation of additional pumps; Santa Cruz-Corumba multipurpose liquid derivatives pipeline, est. U.S.$33 million, start construction in 1975 or 1976; increase capacity of present Santa Cruz-Arica, Camiri-Santa Cruz, Camiri-Yacuiba petroleum pipelines and increase capacity of multipurpose petroleum liquid derivatives pipeline Cochabamba-Oruro-La Paz, scheduled to begin within next four years. **Petrochemical plants:** expansion of refineries in Cochabamba and Santa Cruz and installation of lubricant plant in Cochabamba, expected to start 1975-1977. Engineering and processing studies done by Universal Oil Pr Foster Wheeler Corp. Two plants, one each for pesticides (financed by Govts. of Argentina & Bolivia) and fertilizer-explosives, scheduled to be finished respectively in 1977 and 1979. Two additional fertilizer-explosives plants, one intended to supply Brazil and one Argentina. Yacimientos Petroliferos Fiscales Bolivianos, (YPFB), Casilla 401, La Paz. OPIC.

ITALY—The Public Works Division of the Turin Municipal Administration has announced plans to construct an estimated **$45 million sewage water purifying plant and associated systems,** designed to serve not only Turin but also 10 outlying highly-industrialized towns with total population of 1.4 million. Slated to be completed in three different stages, the first contemplating expenditure of approx. $18 million. Project will be open to international bidding. Firms, or consortiums of firms, wishing to participate in bidding are requested to notify the Cittas Di Torino, Uffico Tecnico Lavori Pubblici, Ripartizione IV (Attn: Dr. Ing. Giovanni Cagliero), Capo Ripartizione, Piazza S. Giovanni 5, 10122 Torino. Bidders required to submit with notification of interest documentary evidence of legal, technical, and financial status as well as ability to complete project successfully. Previous experience in similar projects of this scale especially worth noting. Reports to be drafted in Italian, duly notarized by local Italian Consular Authorities, and submitted to above address by Jan. 15.

THAILAND—The Thai Highways Department, Ministry of Communications, is prequalifying construction firms for **1975 projects.** Prequalification questionnaires must be submitted to the Loans Control Office, Department of Highways, Sri Ayuthaya Rd., Bangkok, before Jan. 15. Copies of questionnaire are available from Jack Randolph, Major Export Projects, Rm. 3056, Department of Commerce, Washington, D.C. 20230, 202-967-4642.

YUGOSLAVIA—The Port of Bar, Republic of Montenegro, has issued prequalification documents for Increment 1-A, Construction of Quays and Earthworks, for **Port of Bar expansion project,** financed by a $30 million IBRD loan and $5 million from Yugoslav sources. Prequalification documents for other increments covering construction and purchase of equipment will be issued separately. Interested firms should contact Engineering Consultant and Trade Enterprise, Lluka Bar (Port of Bar), Bar, Yugoslavia (telex: Lubar 61139). A copy of prequalification document for Increment 1-A is available at the Department of Commerce from Jack Randolph, Major Export Projects Division, Rm. 3056, Washington, D.C. 20230, 202-967-4642.

The Overseas Private Investment Corp. (OPIC) offers political risk insurance to U.S. construction firms planning to submit bids on projects in certain developing countries, identified by the "OPIC" notation at the end of some items. For further information on OPIC's construction insurance program, write Information Officer, Overseas Private Investment Corp., Washington, D.C. 20527. Tel: 202-632-1854.

☆ U.S. Government Printing Office: 1974, 582-685/12

Commerce Department Directory

Commerce Building, 14th Street and Constitution Avenue, N.W., Washington, D.C. 20230, (202) 783-9200

FREDERICK B. DENT, Secretary of Commerce

JOHN K. TABOR, Under Secretary of Commerce

SECRETARIAL OFFICERS

WILLIAM W. BLUNT, Jr., Asst. Secretary for Economic Development

GUY W. CHAMBERLIN, Jr., Acting Asst. Secretary for Administration

JAMES L. PATE, Asst. Secretary for Economic Affairs

BETSY ANCKER-JOHNSON, Asst. Secretary for Science and Technology

ROBERT J. BLACKWELL, Asst. Secretary for Maritime Affairs (Maritime Administration)

C. LANGHORNE WASHBURN, Asst. Secretary for Tourism (United States Travel Service)

KARL E. BAKKE, General Counsel

TILTON H. DOBBIN, Asst. Secretary for Domestic and International Business (Domestic and International Business Administration)

HEADS OF OPERATING UNITS

ROBERT M. WHITE, National Oceanic and Atmospheric Administration

VINCENT P. BARABBA, Bureau of the Census

C. MARSHALL DANN, Patent Office

RICHARD W. ROBERTS, National Bureau of Standards

GEORGE JASZI, Bureau of Economic Analysis

EDWARD D. FAILOR, Social and Economic Statistics Administration

JOHN M. RICHARDSON, Acting, Office of Telecommunications

WILLIAM T. KNOX, National Technical Information Service

ALEX M. ARMENDARIS, Office of Minority Business Enterprise

Domestic and International Business Administration

ALAN J. POLANSKY, Acting, Bureau of Resources and Trade Assistance

RAUER H. MEYER, Acting, Bureau of East-West Trade

CHARLES W. HOSTLER, Bureau of International Commerce

JOHN P. KEARNEY, Ombudsman for Business

SAMUEL B. SHERWIN, Bureau of Domestic Commerce

WILLIAM A. NEWDICK, Acting, Office of Field Operations

DISTRICT OFFICES

ALBUQUERQUE, N.M., 87101, Room 316, U.S. Courthouse (505) 766-2386.

ANCHORAGE, 99501, 632 Sixth Ave., Hill Bldg., Suite 412 (907) 265-4597.

*__ATLANTA,__ 30309, Suite 523, 1401 Peachtree St., NE. (404) 526-6000.

BALTIMORE, 21202, 415 U.S. Customhouse, Gay and Lombard Sts. (301) 962-3560.

BIRMINGHAM, ALA., 35205, Suite 200-201, 908 S. 20th St. (205) 325-3327.

BOSTON, 02116, 10th Floor, 441 Stuart St. (617) 223-2312.

BUFFALO, N.Y., 14202, Room 910, Federal Bldg., 111 W. Huron St. (716) 842-3208.

CHARLESTON, W.VA., 25301, 3000 New Federal Office Bldg., 500 Quarrier St. (304) 343-6181, Ext. 375.

CHEYENNE, WYO., 82001, 6022 O'Mahoney Federal Center, 2120 Capitol Ave. (307) 778-2151.

*__CHICAGO,__ 60603, Room 1406, Mid-Continental Plaza Bldg., 55 E. Monroe St. (312) 353-4450.

CINCINNATI, 45202, 8028 Federal Office Bldg., 550 Main St. (513) 684-2944.

CLEVELAND, 44114, Room 600, 666 Euclid Ave. (216) 522-4750.

COLUMBIA, S.C., 29204, Forest Center, 2611 Forest Dr. (803) 765-5345.

*__DALLAS,__ 75202, Room 3E7, 1100 Commerce St. (214) 749-1515.

DENVER, 80202, Room 161, New Custom House, 19th and Stout Sts. (303) 837-3246.

DES MOINES, IOWA, 50309, 609 Federal Bldg., 210 Walnut St. (515) 284-4222.

DETROIT, 48226, 445 Federal Bldg. (313) 226-3650.

GREENSBORO, N.C., 27402, 203 Federal Bldg., W. Market St., P.O. Box 1950. (919) 275-9111, Ext. 345.

HARTFORD, CONN., 06103, Room 610-B, Federal Office Bldg., 450 Main St. (203) 244-3530.

HONOLULU, 96813, 286 Alexander Young Bldg., 1015 Bishop St. (808) 546-8694.

HOUSTON, 77002, 201 Fannin, 1017 Federal Office Bldg. (713) 226-4231.

KANSAS CITY, MO., 64106, Room 1840, 601 E. 12th St. (816) 374-3142.

LOS ANGELES, 90024, 11201 Federal Bldg., 11000 Wilshire Blvd. (213) 824-7591.

MEMPHIS, 38103, Room 710, 147 Jefferson Ave. (901) 534-3213.

MIAMI, 33130, Rm. 821, City National Bank Bldg., 25 W. Flagler St. (305) 350-5267.

MILWAUKEE, 53203, Straus Bldg., 238 W. Wisconsin Ave. (414) 224-3473.

MINNEAPOLIS, 55401, 306 Federal Bldg., 110 S. Fourth St. (612) 725-2133.

NEW ORLEANS, 70130, Room 432, International Trade Mart, 2 Canal St. (504) 589-6546.

*__NEW YORK,__ 10007, 41st Floor, Federal Office Bldg., 26 Federal Plaza, Foley Sq. (212) 264-0634.

NEWARK, N.J., 07102, Gateway Bldg. (4th floor) (201) 645-6214.

*__PHILADELPHIA,__ 19106, 10112 Federal Bldg., 600 Arch St. (215) 597-2850.

PHOENIX, ARIZ., 85004, 508 Greater Arizona Savings Bldg., 112 N. Central Ave. (602) 261-3285.

PITTSBURGH, 15222, 431 Federal Bldg., 1000 Liberty Ave. (412) 644-2850.

PORTLAND, ORE., 97205, 921 S.W. Washington St., Suite 521, Pittock Block. (503) 221-3001.

RENO, NEV., 89502, 2028 Federal Bldg. 300 Booth St. (702) 784-5203.

RICHMOND, VA., 23240, 8010 Federal Bldg., 400 N. 8th St. (804) 782-2246.

ST. LOUIS, 63105, Chromalloy Bldg., 120 S. Central Ave. (314) 622-4243.

SALT LAKE CITY, 84111, 1201 Federal Bldg., 125 S. State St. (801) 524-5116.

*__SAN FRANCISCO,__ 94102, Federal Bldg., Box 36013, 450 Golden Gate Ave., (415) 556-5860.

SAN JUAN, P.R., 00902, Room 100, Post Office Bldg. (809) 723-4640.

SAVANNAH, 31402, 235 U.S. Courthouse and Post Office Bldg., 125-29 Bull St. (912) 232-4321, Ext. 204.

SEATTLE, 98109, 706 Lake Union Bldg., 1700 Westlake Ave. North (206) 442-5615.

* Regional Offices

UNITED STATES
GOVERNMENT PRINTING OFFICE
DIVISION OF PUBLIC DOCUMENTS
WASHINGTON, D.C. 20402

OFFICIAL BUSINESS

POSTAGE AND FEES PAID
U.S. GOVERNMENT PRINTING OFFICE
First-Class Mail

SEASON'S GREETINGS!

Enjoy the Holidays

Turn the lights down and...

saveEnergy

★★★ to keep America working!